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Training—the Missing Step in the Industrialization of Technical Services

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To me, the word "industrialize" conjures up an image of an assembly line in a factory, with workers at their stations using machines (automation) to manufacture a product.

With this image in mind and for the purpose of this article, let us arbitrarily define the word "industrialize" to mean the process of increasing productivity (i.e., production of a product) through:

- the effective use of automation to improve efficiency and standardization;
- the division of labor (focusing on and raising the level of our core competencies and finding others to manage needs outside those competencies);
- streamlining processes to increase workflow;
- implementing quality control and accountability to maintain demand for the end product

Can we apply this definition and these steps to the products of a technical services department of a library? Perhaps we should first establish what the products of a technical services department are supposed to be.

It is generally accepted that one of the primary purposes of a library is to collect resources to satisfy the educational, informational and recreational needs of its patrons. For patrons to find the resources in a library's collection, those resources must be organized and made accessible. In this scenario, therefore, accessible resources are one of the principal products of a library.

To produce this product—accessible resources, a typical library will integrate the following steps into its 'assembly line':

1. Choose the resources to be added to the collection (Collection Development);
2. Acquire the resources (Acquisitions);
3. Process the resources (Processing);
4. Provide bibliographic information about the resources for the library's catalog so that patrons can find the resources, especially from off-site locations (Cataloging);
5. Make the resources available (shelve them; mount them on systems; etc.)
6. Check the physical resources out and (hopefully) back in again (if appropriate) (Circulation);
7. Provide support services to help patrons find resources (Access Services)
8. Arrange for resources to be borrowed from and loaned to other libraries (ILL);
9. Maintain automated systems to support all of the above functions (Systems)

Step 4—providing bibliographic information about the resources is one of the key steps in making resources accessible to users. Library collections are too large and often too physically distant for users to scan shelves to find what they need. A library catalog provides specific information about the resources in a library's collection. Instead of having to hunt through shelves or databases of resources, users can search a catalog of descriptions of the resources and then decide from these descriptions whether or not the actual items might meet their needs.

Consequently, accessible resources are one of the principle products of a library; construction and maintenance of an effective catalog (sometimes known as 'cataloging') is an essential component in producing accessible resources; the library catalog is the primary product of a technical services department.

Industrializing cataloging, then, is the focus of this article. Let us see how our list of steps can be applied to the process of cataloging resources to make them accessible to users.

The effective use of automation should allow us to provide more and better cataloging, more efficiently, and with greater cost savings, all in one neat package ("better, faster, cheaper"). However, I contend that the key word here is 'effective'. Business and manufacturing companies would soon be out of business if they tried to get by with untrained staff 'doing their best' to produce a product using unfamiliar tools and with no training. So why do we seem to think that catalogers can do a good job of cataloging while struggling under that handicap? It is true that many libraries make great efforts to provide the necessary tools and the training on how to use them. However there are too many libraries that 'cannot afford' to hire trained staff or train the staff they hire. Yet those libraries are expected to partner with other libraries and include their cataloging records in union or virtual catalogs and have those records 'play well with others'. More automation and better tools are not going to help if the users of those tools do not have the proper training in the fundamentals of their craft to allow them to use the tools effectively.

If we are to have any hope of increasing our cataloging productivity, we must focus on our core competencies, the skill sets that we need in order to produce our product—a catalog to make the library's resources accessible. Sloppy manufacturing will not produce a product that sells, nor will 'doing the best we can'. Rules and standards are vital to the production of a useful catalog to make our resources accessible, if those resources are to be accessible beyond the limited boundaries of our own physical collections. When our only concern was our own patron who walked in our own door and walked to our own shelves to find our own resources, we hardly had to do much to make our resources available for that patron. These days, however, 'our patrons' are dialing in from home or interlibrary-loaning from across town, across the state, across the country, and across the world. We must have consistent bibliographic information made available by the steadfast application of rules and standards if we are to provide our products to those patrons.

Finding others to manage our needs outside our competencies can help us to increase productivity. Outsourcing the cataloging of a collection of resources in a language with which we are not familiar, is a better alternative than letting that collection sit on the back shelves, inaccessible for years. Batchloading files of MARC records for an opening day collection, or an aggregator set of electronic journals, or a collection of ebooks may be the only way that a new library can be opened on time, or the ejournals or ebooks can be made available. However, we still need trained staff in our libraries to check the work done by others and load the files of outsourced records correctly so that they will not conflict with our own records.

Streamlining our processes can, undoubtedly, boost our workflow. Time and motion studies, for example, might show us where we have log jams of unnecessary work carried over from when we automated our manual processes. There are undoubtedly still ways that we can simplify and improve our procedures. However, we must beware of oversimplification. There are some who do not see the big picture and do not understand the complexity of what we are trying to do. They shortsightedly demand that we somehow "make cataloging easier." The only problem with this particular demand is that the end product will not be what our customers are demanding—accessible resources. The resources will be on a shelf or in a system, but finding those resources will be a matter of hit or miss, making those resources, in effect, inaccessible.

This brings us to the last step on our industrialization list—quality control to maintain demand for the end product of accessible resources. What is the point of making more, cheaper records more quickly if those records are not good enough to function properly in a library automation system to make the resources accessible?

If you purchase a file of records for ebooks, and those records contain LCCN that are duplicates of LCCN that are already present in records in your database for the print versions of those works, what will happen to your ebook records when you load them to your library automation system? In many systems the ebook records will match the print records on the duplicate LCCN and one of the matching records will be lost. Quality control before loading will prevent a huge mess (especially if your system is set to overlay existing records with matching incoming records). But you must have the trained staff to know how to do that quality control.

If cataloging staff does not know that fixed field codes in cataloging records in the MARC format are useful, then the MARC records that they produce will be missing the kind of information that allows a patron to narrow a search by language or material type or date of publication. If they do not know about indicators in MARC records, then fields in the records may be unsearchable or invisible or strangely labeled. If they do not know how to assign subject headings, then subject access to your resources will be lost. If they do not know how to do authority control on headings in records, then consistency in headings will be lost, making it difficult for patrons to find resources by known names and thus impeding access to the resources. Quality control on cataloging records will reveal all of these problems, but you must have trained staff to do that quality control.

Every administrator dreams of the day when none of their staff will have to know how to make catalog records from scratch because someone else, somewhere else will have already made a record for every resource in the world. Unfortunately, this is not the reality for most libraries, especially those that collect any kind of local material. In addition, it is folly to assume that all copied records are perfect. In fact, although I have no solid statistics to offer, all reports that I hear from the field indicate that the quality of the records available for copying is getting worse instead of better. Is it possible that those other libraries out there, doing the work that you don't want to do to create the original records that you want to copy are struggling with lack of training also? It is a sobering thought.

Conclusion

Just as it is for businesses in the 'real world', industrializing the workflow in technical services seems to be the only way that we can hope to keep up with the demand for accessible resources to meet the informational, etc. needs of our patrons. However, without adequate training, there is no point in pumping money into new technology or outsourcing, or even into trying to streamline our processes. Without training in our core competencies, library staff cannot know the cataloging rules and MARC standards that are needed to make consistent records for our library databases. Without training in the use of new technologies, staff does not know how to use those technologies effectively. Without training in the concepts of MARC databases as well as MARC records, catalogers and/or systems staff cannot know how to do quality control on the records and databases.

Collecting library resources and getting them organized and made accessible to patrons is a complicated and many-layered process. Knowing how to accomplish this procedure is not intuitive, it must be learned. It cannot be learned by reading manuals on one's own or by trial and error because there are too many layers to the process, all of which must be pulled together to produce the end product. I therefore argue that the most important element in the industrialization of the workflow in technical services, and the one that is most often missing, is training in the effective use of the many tools that must be utilized in order to produce the principal end product of technical services—an effective catalog to make resources accessible for the use of library patrons.