

TECH NOTES

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ACTSS Board 2002

Message From the President

ACTSS Colleagues,

This year is promising to be an extremely active and productive one!

UPCOMING PROGRAMS

Our excellent Board members have been working hard to put together a roster of programs for continuing education opportunities throughout the year and for the 2002 CLA Conference. We hope that you will take advantage of these to enhance your knowledge and to keep abreast of trends in librarianship.

Coming up very soon on April 5, is a co-sponsorship between the ACTSS and the Northern California Technical Processes Group

(NCTPG). We will be presenting a program entitled "Metadata and More" that will feature Clifford Lynch, Executive Director of the Coalition for Networked information (CNI), Karen Schneider, Coordinator of the Librarians' Index to the Internet, and Guenter Waibel, Digital media Developer, Berkeley Art Museum & Pacific Film Archive. This is quite an impressive roster of speakers! The program will take place at the San Francisco Public Library. I hope to see many of you there.

In May, the ACTSS will be presenting a workshop on The World of Acquisitions. Presenters will be Christa Easton and Sharon Propas, of Stanford University, and the workshop will cover monographic acquisitions, non book acquisitions, serials

acquisitions and electronic resource acquisitions. This workshop will be presented in both the North and the South. The Southern California workshop will be held at Thousand Oaks Public Library in Thousand Oaks on May 3rd and the Northern California workshop will be held at Alameda County Library in Fremont on May 10th.

June will feature a workshop on Electronic Serials. The ACTSS is co-sponsoring this with OCLC -- a first for both organizations. The training will also be presented on June 7 in Northern California and on June 27 in Southern California. The Serials Cataloging Cooperative Training Program (SCCTP) certified trainers will be Pat French of UC Davis, and Becky Culbertson of UC San Diego.

Finally, stay tuned for an Advanced Serials workshop tentatively being planned for September. This will

2

also be conducted in both Northern and Southern California by SCCTP certified trainers.

We have submitted proposals for two exciting programs in the 2002 CLA Conference.

The first is a collaboration between the ACTSS, the Information Technology Section and the Reference and Information Services Section. It will feature speakers Roy Tennant, of the California Digital Library, and Anne Lipow, of Library Solutions Institute and Press. The proposed title is "*The Power of Metadata: Not Just for Techies.*" The submitted program description is as follows: "*Roy Tennant and Anne Lipow collaborated to make the Internet accessible to the layperson. Now they'll do the same for metadata. If you thought that metadata was just for technical services folks, think again! This lively interchange will illustrate how the principles of librarianship are being applied to build exciting new collections and services.*"

The second program is collaboration between the ACTSS and the Collection Development Round Table. The proposed title and description of the session provided by the Chair of the Collection Development Round Table are as follows: "*KISS, KISS (two demonstrations of Klear Information: Single Search Technology) -- Two libraries and two vendors will demonstrate their approach to creating a simple user interface with a variety of electronic databases, electronic collections, and library indexes and opacs thru the new technology known as "Single Search Technology" Muse Global will demonstrate its partnership with New York Public Library and Webfeat and San Francisco Public*

Library will demonstrate their approach to an alternative form of this technology."

Look for these programs in the conference schedule!

ACTSS BUDGET

The ACTSS presently has a balance of \$7374.19 in its budget.

The current CLA administration is encouraging the practice of paying a fair remuneration to trainers who conduct workshops. For that reason, I plan on using our surplus to keep the costs of workshops down for participants while offering an honorarium to retain quality trainers. That way, I hope that the ACTSS will be able to continue to provide excellent and low-cost continuing education experiences.

CLA THREE YEAR PLAN

You may remember from my October 2001 report that the CLA Leadership Retreat participants came up with a list of 6 goals and 24 objectives to be accomplished over the next three years.

Subsequent meetings of the Executive Committee and the 2001 and 2002 Assembly members compressed the original list to 3 goals and 11 objectives.

They are:

1. Add Value to Membership

- Retain current members
- Recruit new members
- Advocate for the fair compensation of all library workers, and work to ensure that administrators, elected and appointed officials, and the public understand the complexity and value of library work

Tech Notes

- Sustain current legislative program
- Use the CE survey to develop a relevant, high quality CE program

2. Strengthen the Effectiveness and Vitality of the Association

- Create and implement a communication plan that utilizes the best practices in technology
- Diversify the Association's funding base
- Evaluate and make recommendations on the organization's structure in the light of current needs

3. Create a Unified, Singular Voice for the California Library Community

- Create an agenda and structure for collaboration
- Conduct a conference of invitees to develop strategies for ongoing collaboration
- Develop agenda for development and implementation of strategies and outcomes defined and developed at the conference

I have tried to formulate the 2002 ACTSS Workplan around supporting the CLA goals.

In support of Goal #1, we will be striving to retain current members and to attract new members by offering an effective forum in which to share knowledge and to continue education. We will also be monitoring appropriate listservers and publications with an eye towards recruiting library workers new to Technical Services. Our workshops in the areas of acquisitions, serials and cataloging will forward our continuing education agenda.

3

Under Goal #2, we will continue to utilize the best practices in technology to communicate with our members and other library organizations. We will publish the section newsletter, TechNotes on a regular basis, distributing it electronically where possible. We will maintain the section website, posting information concerning section matters in a timely manner. We will utilize our network of listservers to publicize sponsored events, and the CLA newsletter to inform CLA members of our activities. Finally, we will communicate recommendations on the organization's structure through our Assembly representation.

We are advancing the collaborative agenda of Goal #3 through our many programs. We are co-sponsoring programs with the NCTPG and OCLC, and are collaborating with the Information Technology Section, the Reference and Information Services Section and the Collection Development Round Table on sessions to be presented at the 2002 CLA Annual Conference.

SUPPORT YOUR SECTION!

I would like to take this opportunity to thank my Board of Directors for all of their efforts on behalf of the ACTSS. I could not have asked for a more dedicated and responsive group of people. They have made my tenure as President extremely rewarding.

We have tried to put together an agenda that supports as many areas of librarianship as possible. Our workshops cover topics in acquisitions, serials, and cataloging. Our proposed conference programs are designed to appeal to reference, information technology and collection development specialists

as well as those in technical services.

If you feel as strongly as we do that these activities are important, please support them by attending the programs that we set up. In order for us to continue providing affordable and high quality professional development opportunities, we need to have our members take advantage of our offerings.

If you do not feel that what we are doing is relevant, then you need to let us know what we should be doing on your behalf.

This is your section. We are what you make us.

President's Annual Report for 2001

The continuing goal of our Section was to provide quality educational, accessible, and affordable programs for our members throughout the year.

Cataloging eBooks was the only workshop organized this year. It was organized by the Program Committee Chair, Aimee Algier aided by Herbert Gore. One was held August 1st at Pepperdine in Southern California and the other on August 2nd at Santa Clara University in Northern California. There were 22 participants in the South and 33 participants in the North. Lynn Connaway, Vice President for netLibrary, gave the workshop. She defined an eBook, discussed netLibrary's eBooks and outlined the reasons why netLibrary decided to catalog them. She

Tech Notes

described the current cataloging process at netLibrary, its problems, successes and challenges, and shared with us the tools that are used to catalog eBooks. She also discussed netLibrary's relationship with OCLC, including their use of Prompt Cat. The OeB, Open eBook Forum was also defined and discussed in detail. It was a very successful workshop and everyone learned a lot about eBook cataloging.

Due to external and, alas, unfortunate circumstances the Cataloging Interest Group was not able to organize a meeting this year. Nevertheless, the future is bright, the new incoming chair of the Group, Armanda Barone of UC Berkeley will take the programing in her capable hands.

Charlotte Xanders was our representative to the Association for Library Collections and Technical Services Council of Regional Groups of ALA. With ALA in San Francisco, I myself had a chance to attend, along with, Charlotte the Business meeting. Work is being done on an input to ALCTS Strategic Plan. When done it will be posted. There were some interesting statistics mentioned, the job market the year before at ALA listed 1040 jobs with only 400 librarians showing interest. To further this 50% of the 1040 jobs were for catalogers. No figures how many of the 400 were catalogers. One can just imagine...There was also discussion of better communication – the perpetual problem – on the other hand with our electronic devices, how much easier that had become today. Continuing education was discussed as important goals, just as much as it is ours. Some topics were recommended: Fundamentals of Acquisitions, Binding Institute, Metadata workshops. Very much

the topics of our days. For programs and workshops help can be found for financial background by ALCTS' Fundraising Committee. This Committee has strict policies that need to be followed when approaching potential donors. It was said that "These guidelines would be good for Regional Groups". For more details please see: <http://www.ala.org/alcts/you/manual/fiscal.html#sec4>.

The ACTSS Award was presented to Becky Culbertson. The award acknowledges superior achievement by an individual in those areas of the library profession that encompass access collections and technical services. Becky is head of the Central Cataloging Authority of the Shared Cataloging Program of the California Digital Library, located at UC San Diego. Her challenge was not only to catalog the licensed electronic resources but to share this work with others. Becky has been instrumental in accomplishing this very complicated task. She has worked closely with the acquisitions arm of the CDL and with systems people. She has worked with OCLC to have the records available there. She has been characterized as the "preeminent cataloger in the country of electronic materials."

Submitted by Maryll Telegdy,



President 2001

Becky Culbertson, ACTSS Award Winner and Pat French.

Minutes from the ACTSS Membership Meeting

**ACTSS Membership Meeting
November 5, 2001
Long Beach Convention Center**

Maryll Telegdy, President, welcomed everyone to the annual membership meeting and asked each board member to introduce him/herself.

Incoming President: Lynne Toribara
President Elect: Merry Schellinger
Incoming Secretary: Jamie Gold
Outgoing Secretary: Marsha Pollak
CLA Assembly Representative: Libby Flynn
Program Committee Chair (continuing) : Aimee Algier
Incoming Cataloging Interest Group Chair: Armanda Barone
Past President: Pat French

Not present:

Incoming ALA ALCTS CRG Representative: Elaine Franco
Membership Committee Chair (continuing): Kathleen Darr
Newsletter Committee Chair (continuing): John de La Fontaine

Tech Notes

REPORTS

Maryll reminded everyone that the goals of the Section are to provide continuing education programs (ideally in cooperation with other Sections and Round Tables), to acknowledge outstanding individuals with the Technical Services award, and to support the work of the Cataloging Interest Group.

Maryll announced that ACTSS has its own web site, found within CLA's web site. Go to cla-net.org and click first on Organization, then Sections and Round Tables, then on Access, Collections and Technical Services. You will find information about upcoming workshops and programs, our newsletter, Tech Notes, as well as a listing of section goals, officers and committees. Maryll thanked our newsletter editor, John de La Fontaine, for doing this.

Program Committee

Aimee Algier, assisted by Herbert Gore, planned the program *Cataloging eBooks*, which was presented in the North and South. The presenter, Lynn Connaway, from netLibrary, defined an eBook, discussed netLibrary's eBooks and outlined the reasons why netLibrary decided to catalog them. Both meetings had a very good turnout.

The Cataloging Interest Group was unable to organize a program this year. Armanda Barone of UC Berkeley is the new Chair.

There were two programs at the Long Beach conference: *Online Systems: Bridging between Selectors and Technical Services*, and *Dynamic and Mysterious Technical Services Revealed at*

5

Last. The first presentation was on online selection tools: iPage, Title Source II and LIBRIS. This session was co-sponsored with the Collection Development Round Table. The second program gave a historical retrospective of technical services in California, current trends in the field of information management and discussed future prospects.

Terri Works will be the ACTSS representative to the CLA Programming Committee.

ALA ALCTS CRG

Charlotte Xanders, our representative to the Association for Library Collections and Technical Services Council of Regional Groups in ALA, and Maryll both attended the business meeting during ALA in San Francisco. Continuing education is also an important goal in this group. Suggested program topics included: Fundamentals of Acquisitions, Binding Institute, and Metadata Workshops.

Membership Committee

Karleen Darr was unable to attend our membership meeting, but she sent a report. Karleen actively participated in the CLA Membership Committee, which naturally has direct implications for us. What follows are highlights from her report.

- ACTSS membership has increased from 162 members as of last year to 182 members this year. Please remember to look for new members among your colleagues.

- CLA Executive Committee only authorized an inexpensive print and online brochure due to a tight budget and low revenues. \$3000 is designated for both the brochure and to improve CLA's website.
- CLA will implement an anniversary membership billing system in FY 2002-03. The Membership Committee is charged with implementing a "full-scale education campaign to members and its implications for their pocketbooks."
- CLA is considering a dues increase. The Membership Committee will analyze the dues structure and bring back a recommendation.

Financial Report as of October 30, 2001

CLA's fiscal year is from July 1- June 30.

Balance from last year: \$5,698.83 (from memberships, etc.)

Income 2000-2001	1,741.84
Income 2001-2002	258.73

(July 1-Oct. 30, 2001)

Present Balance: \$7,699.40

ACTSS Award

This honorary award was presented by past-president Pat French to Becky Culbertson, Electronic Resources Cataloging Librarian at UC San Diego. The award acknowledges superior achievement by an individual in those areas of the library profession that encompass access, collections, and technical services. It is an opportunity to recognize our colleagues who have made outstanding contributions in those areas that have been challenged by the need for innovation and

Tech Notes

adaptation in dealing with quickly changing technology.

Becky is the head of the Central Cataloging Authority of the Shared Cataloging Program of the California Digital Library, located at UC San Diego. When the CDL was established, it was decided to base the cataloging in one place and then share this information with others. UC San Diego was awarded the cataloging site. The challenge was not only to catalog these licensed electronic resources but to share this work with others. Becky has been instrumental in accomplishing this very complicated task. She has worked closely with the acquisitions arm of the CDL and with systems people. She has set up a delivery distribution system to keep the records current and track the content. No one else has to touch the record. She has worked with OCLC to have the records available there. Becky has been characterized as the "preeminent cataloger in the country of electronic materials." Our congratulations go out to her.

Member Input from the Floor

At this point Maryll handed over the virtual gavel to Lynne Toribara, incoming President. Lynne reported on her networking efforts with other sections regarding presenting collaborative programs. The Reference Section is interested in programs on Information Literacy and Metadata. The Information Technology section, now headed by our newsletter chair, John de La Fontaine, is also interested in doing a collaborative program.

6

Roberto Esteves, from the Collection Development Discussion Group, suggested a program on Linking Information Sources. He described a product from the vendor MuseGlobal which would do front end searching more effectively.

Other suggested program topics are:

- Marc holdings data workshop
- Revised serials workshop
- Internet and Acquisitions
- A-V packaging
- Catalog Enhancements

*Submitted by Marsha Pollak,
ACTSS Secretary*



Minutes from the ACTSS Board Meeting

**Santa Clara University
January 10, 2002 9:45-2:30**

Present: Lynne Toribara, Merry Schellinger, Maryll Telegdy, Jamie Gold, Libby Flynn, Elaine Franco, John de La Fontaine, Aimee Algier, Karleen Darr, Armanda Barone

President Lynne Toribara called the meeting to order at 9:50 a.m.

Announcements

President Lynne Toribara shared a tentative schedule of deadlines obtained from the CLA office. Conference Program Proposals are due by February 28th. The Nominating Committee should have a slate of candidates, acceptance forms and statements of professional concern by the end of April. Election results will be announced in August.

There is approximately \$7300 in the ACTSS account.

Committee Reports

Program Committee

Aimee Algier reported on a number of proposed programs for the upcoming year. Program proposals include Electronic Resources Cataloging, Acquisitions (the Section has not sponsored an Acquisitions program in many years; Aimee will contact Christa Easton at Stanford as a possible trainer), and Advanced Serials Cataloging (Pat French to conduct; possible co-sponsorship with OCLC).

The first proposed program is a reprise of the SCTPG program "Cataloging Internet Resources" with Steve Shadle (University of Washington libraries) and Greta de Groat (Stanford).

Herb Gore has again offered to assist with programs in Southern California.

Elaine Franco reminded the group that CLA should be notified when ACTSS plans to co-sponsor programs with another organization.

Membership Committee

Tech Notes

Karleen Darr distributed a copy of the new CLA brochure. The ongoing issue of recruitment and retention of CLA members was discussed. It was suggested that lapsed members be called to encourage renewal of membership. Discounted fees for combined ALA/CLA first-time membership will be offered again this year. Elaine Franco forwards names of California technical services staff from AUTOCAT and other sources to Karleen who sends an email or mailing to encourage membership in ACTSS. The Board of Directors and Committee Chairs were encouraged to send names to Karleen for this recruitment effort.

Newsletter

John de La Fontaine reported that the next issue of Tech Notes will be in March. It will include Past-President Maryll Telegdy's report of Section activities in 2000/2001, minutes of Board of Directors' meetings, President Lynne Toribara's work plan, an update on CLA Conference planning from Terri Works and a call for nominations and/or volunteers from the Nominating Committee (Jamie Gold and Maryll Telegdy).

The Section's By-Laws and Standing Rules will be added to the ACTSS website.

Information on current Section officers will be updated.

A picture of the Board of Directors and Committee Chairs was taken and will be added to the website.

The Events/Programs section of the website will be updated. Information about past workshops will be included as a marketing tool for the Section.

Cataloging Interest Group

Armanda Barone will ask Becky Culbertson, Electronic Resources Cataloging Librarian at UC San Diego (and recipient of last year's ACTSS award), to be Vice-Chair of the Group. Ideas in the works include workshops on Serials Cataloging, Electronic Resources cataloging, Subject/Classification analysis, Classification Plus and a session at Conference involving networking and information sharing among cataloging units of various sizes.

While the Section generally offers the same workshops in both Northern and Southern California it was agreed that if a topic has been presented recently in either region (such as the SCTPG "Cataloging Internet Resources" workshop) it would be possible to offer the workshop in only one region.

Conference Planning Committee

A tentative schedule of the 2002 CLA Annual Conference was distributed. The conference will be held in Sacramento from Thursday, November 14, 2002 through Monday, November 18, 2002. The theme will be "Building Our Strengths". There was general relief that there will be no Section or Committee meetings before 9:00 a.m.! ACTSS tentatively plans to offer programs on Saturday and Sunday afternoons.

CLA is encouraging more co-sponsored or merged programs at Conference. To facilitate this, we will ask our representative to the Conference Planning Committee to encourage the Committee to schedule a session where representatives from the various sections and round tables can

network to plan collaborative programming efforts.

Roy Tennant and Anne Lipow have agreed to do a program on Metadata ("The Power of Metadata : Not Just for Techies") to be co-sponsored with the Reference Services Roundtable and Information Technology Section.

The Collection Development Roundtable has suggested co-sponsoring a program on one-stop searching for Acquisitions. After much discussion it was decided to ask their representative, Roberto Esteves, for further clarification on this proposal.

CLA Long Range Plan

The three goals of the CLA Long Range Plan for 2002-2005 were reviewed. ACTSS is performing well within the objectives of these three goals. The Section has retained and increased membership, continues to offer high-quality and well-attended continuing education programs, uses technology to communicate effectively with the membership, and generates revenue via fees for programs and workshops.

Assembly Report

Representative Libby Flynn reported on the November 5, 2002 Assembly Meeting in Long Beach. Concerns were expressed regarding scheduling, short duration and lack of focus of Assembly meetings and the lack of clear guidelines for protocols and member input and participation.

Section By-Laws and Standing Rules**Tech Notes**

By-Laws, Standing Rules, and documentation of job descriptions and common practice (drafted by M. Telegdy) were reviewed and, to some extent, revised. Elaine Franco and Karleen Darr will continue to work on this.

CLA/ACTSS Award

President Lynne Toribara distributed documentation concerning the award as well as an example of the criteria used by the New England Technical Services Librarians organization. It has been proposed that the CLA/ACTSS criteria be revised to include retirees and volunteers so as not to limit eligible candidates to paid employees. Due to time constraints, there was little time for discussion of this proposal. Lynne will check with CLA regarding the feasibility of this change.

The meeting was adjourned at 2:30 p.m.

*Submitted by Jamie Gold,
Secretary*

**Upcoming Programs:****METADATA and MORE**

Northern California Technical Processes Group

Annual Meeting & Program

8

co-sponsored by **CLA-ACTSS**

Friday, April 5, 2002

San Francisco Public Library

Koret Auditorium

San Francisco, CA

9:00am-9:30am Registration and Refreshments

10:00am-12:30pm Program

Clifford Lynch, Executive Director of the Coalition for Networked Information (CNI), "Bibliographic Description and Far Beyond: Metadata Developments in the Broad Context"

Karen Schneider, Coordinator of the Librarians' Index to the Internet, "The Fiat Lux Cooperative: Towards A Yahoo With Values And A Brain"

Guenter Waibel, Digital Media Developer Berkeley Art Museum & Pacific Film Archive, "Sharing Information Through Standards: Museums and the Online Archive of California"

12:30pm-12:45pm

NCTPG Business Meeting

Cataloging Electronic Serials

OCLC and CLA/ACTSS (Access, Collections and Technical Services Section) will be co-sponsoring SCCTP Cataloging Electronic Serials workshops in Northern California at the University of California Berkeley, Friday, June 7th, and in Southern California at National University in San Diego, Thursday, June 27th.

(1 day; \$75.00 for members, \$100.00 for non-members.

Workshop fees will be added to your institution's monthly invoice.)

Contact Diane Mohr,
OCLC Western Service Center
(800) 854-5753
e-mail: diane_mohr@oclc.org,
or contact
Armanda Barone,
University of California Berkeley
(510)643-8239,
e-mail:
abarone@library.berkeley.edu.

To register online, visit the OCLC web site at:
<http://www.oclc.org/western/training>.
Seating is limited so register early!

This SCCTP workshop focuses on the issues related to cataloging Web-based journals and other types of electronic serials. Direct access (e.g., CD-ROM) formats and integrating resources are not covered. In addition to reviewing the basic rules and procedures, the course includes problem-solving exercises and discussions on aggregations, single record approach, and other challenges of providing access to electronic serials in libraries. The course is designed for those with some experience cataloging serials and does not include all aspects of serials cataloging, such as title change rules.

9:00 to 3:30 p.m.,
Friday, June 7, University of California, Berkeley
Thursday, June 27, National University, San Diego

Presenters:
Pat French (University of California-Davis)
Becky Culbertson (University of California-San Diego)

Tech Notes

The World of Acquisitions

CLA-ACTSS will be sponsoring a workshop entitled The World of Acquisitions to be held in both Southern and Northern California. Christa Easton and Sharon Propas from Stanford University will be the presenters. The Southern California workshop will be held on May 3rd at Thousand Oaks Public Library; the Northern California workshop will be held in Fremont at the Alameda County Library. The workshop hours are 9-3. The cost is \$25. Please contact Aimee Algier at aalgier@scu.edu for more information.