QC by Number

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You don't really control anything.

Sheldon Kopp. *An Eschatological Laundry list: A Partial Register of the 927 (or was it 928?) Eternal Truths*

Today's agenda

- Introductory questions
- Cataloging quality control at Bowdoin College
- Demonstration
- Conclusions
- Your questions

Quality Control by Number

Introductory questions

- What is quality in the catalog?
- What affects quality?
- How have libraries traditionally tried to improve quality standards?
- How have libraries traditionally tried to improve quantity standards?
- How do we know all this, since we've only worked at automated libraries?

Quality Control by Number

What is quality in the catalog?

The quality (or lack of quality) of cataloging and classification may be judged insofar as these operations foster (or undercut) three goals:

a) promoting *predictability* of retrieval, as opposed to guesswork
b) promoting *serendipity* in retrieval
c) promoting *depth of access* to books

Thomas Mann, LC Cataloging Forum opinion paper, 1994

Quality Control by Number

What is quality in the catalog?

Cataloging quality is...

- accurate bibliographic information that
- meets the users' needs and provides
- appropriate access in a
- timely fashion

Barbara Tillett, LC Cataloging Forum, 1995

Quality Control by Number

What is quality in the catalog?

Further questions for the measurer...

- What is an error?
- What is a significant error?
- Do all errors count (the same?)?
- What are some benchmarks for quality standards?
- Is there room for cataloger's judgment?

What affects quality in the catalog?

- Automation... and the degree of technological change
- Standards... that change (including production standards)
- Managers... who train
- Administrative support... for TS as a PS

How have libraries tried to improve quality standards?

- Revision... "another pair of eyes"
- Correction... to err is ~~Gorman~~ human
- Specialization... Marcia does all the Latvian bound-withs
- Automated QC... Duplicate Detection Software

How have libraries tried to improve quantity standards?

- Minimal-level cataloging... from K-level to PCC Core
- Generalization... after staff reductions
- Outsourcing... money for contracts, not personnel
- Infrequent revision... out of sight, out of backlog

How do we know all this?

- Read your bibliography
- Check your mailbox
- Look over the partition
- Search your catalog

Bowdoin College

- Liberal arts college
- Brunswick, ME
- Founded 1794
- 1,608 students
- 199 faculty
- $32,650 per year

Bowdoin College Library

- over 900,000 volumes
- ~14,000 vols. added / yr.
- 35.1/15.5 FTE/Librarians
- 129,000 circs
- 12,223 patrons
- 5 branches
- $1.5 million materials budget
- OCLC symbol BBH

Quality Control by Number

Bowdoin College Library Catalog

- Innovative Interfaces
- Installed 1990
- pre-Millennium
- 475,000 bib. records
- 249,000 authorities
- http://phebe.bowdoin.edu
- telnet://phebe.bowdoin.edu

Quality Control by Number

Bowdoin College Library Catalog Librarian

- Installed 1994
- Re-installed 1998
- Supervises 3-4 FTE
- Innopac system coordinator
- Reference desk duties
- Academic department liaison

Quality Control by Number

Bowdoin College Library Technical Services Assistant

- Installed 1994
- Receives and catalogs
- Oversees all end-processing
- Supervises 2-4 students
- Performs database maintenance, quality control, and loading of Marcive records
- Oversees transfers and withdrawals

Quality Control by Number

Catalog quality control at BBH

- Authority control... brief remarks
- Staffing changes... Acq + Cat = TS
- Cataloging workflow changes
- OneStep quality control
- Outsourcing quality control
- Vendor-supplied cataloging quality control

Quality Control by Number

Authority control at BBH

- Cornerstone of catalog quality control
- In-house
- New/invalid headings reports (III system)
- Expensive... OCLC access, staffing
- How we did not do it "good"
- Future directions

Quality Control by Number

Cataloging staff changes at BBH

STAFFING	1950-1992	1994-
Librarians	5 FTE	1 FTE
Support Staff	4 FTE	3 FTE
Student Labor	5.5 FTE	1 FTE
TOTAL	14.5 FTE	5 FTE

Workflow changes at BBH

The *OneStep* workflow integrates the receipt and cataloging of most library materials into a single process.

- Download full MARC bibliographic record to local system at time of order.
- Receive and catalog material in the local system; barcode and create item record.
- Receive, barcode, and create item record for material which requires cataloging work outside of the local system; shelve for cataloger's review.
- Send material to Marking Table for further processing: spine label, security strip, date due, etc.
- FTP records to OCLC for batch updating.

Reporting BBH holdings to OCLC

- **FILE A -** Create a file of all records for titles catalogued in the preceding month
- **FILE B -** Create a sub-file of records for all OneStepped titles (not catalogued interactively on OCLC - bcode2=!)
- Technical Services Assistant performs QC processes 1-6 on file B
- Technical Services Assistant reports holdings to OCLC, [performs QC processes 7-14 on file A]

Quality control processes 1-6

1. No Cat. Date
2. No Received Date (sometimes valid condition)
3. Bibliographic location = ORDER
4. Blank FF (conditions 1, 3, and 5)
5. Blank bcode2
6. Bcode2 = 1 (common typographical error)

- performed by Technical Services Assistant since 6/98 (originally performed by Technical Services Librarian)

Quality control processes 7-14

7. Sort by/review/extract Leader 17 - Encoding level
8. Sort by/review/extract Leader 07 - Bibliographic level
9. Sort by/review/extract Leader 24-27 - Contents/Nature of work
10. Sort by/review/extract Leader 18-21 – Ill
11. Sort by/review/extract 043 – Geographic Area Code
12. Sort by/review/extract 245|a –Title proper - Filing indicator
13. Statistical cross-tabulation (MAT TYPE and LOCATION)
14. Anomalies in cataloging statistics

- to be performed by Technical Services Assistant (currently under investigation by Catalog Librarian and Technical Services Assistant)

Outsourced cataloging QC

- Standards
- Specifications
- Contractual obligations
- Revision... every record at first... same procedures as before
- Feedback... you are training TechPro catalogers

Vendor-sourced cataloging QC

- Landmark... Audiobook leasing program - reviewed sample records prior to loading
- MARCIVE, Inc... GPO full and SLS records - reviewed sample records prior to loading - customized load table and 949 item creation - created special suppression codes for loads
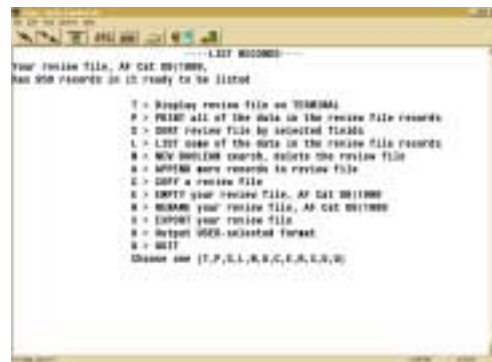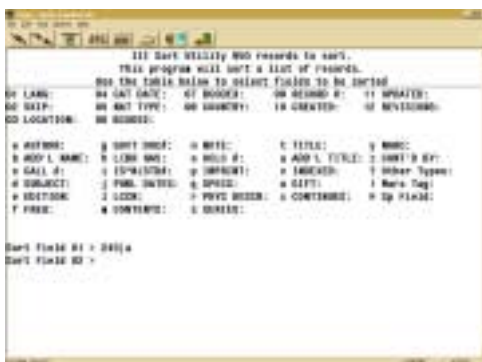
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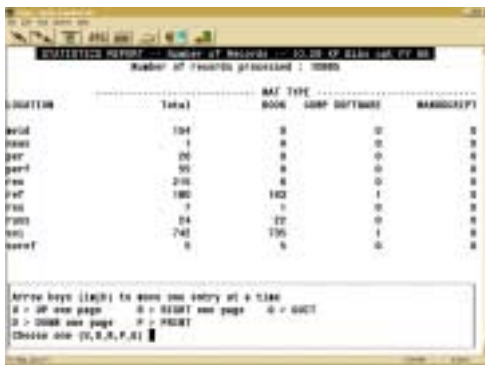

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Concluding remarks

KANE

- Learn your system
- Experiment safely
- Show a colleague
- Do SOMETHING
- Automate it (script/macro)
- Share it with others
- And remember…

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All evil is potential vitality in need of transformation.

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