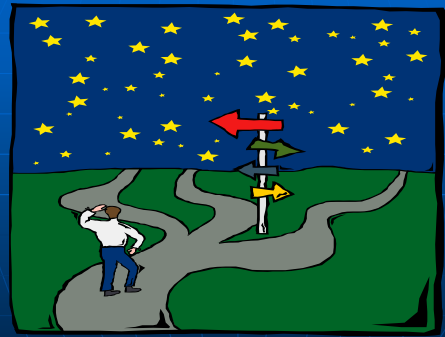


CASALINI LIBRI SHELF-READY PILOT PROJECT

Presented by Angela Kinney
at the
Joint BIBCO/CONSER
Meeting
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The Path through MFBC



Realignment of Library Services

- Principles underlying the change in organizational structure
 - Integration of analog and digital collections and services is essential
 - Library services will be organized from the users' perspective
 - Partnerships are essential to our success
 - Collections are our legacy

Why Shelf-Ready?

- Can book vendors provide books with:
 - Descriptive metadata (including complete LC class numbers, subject headings and TOC data)
 - Security strips, binding, and labeling
 - At less cost
 - More quickly
 - Without sacrificing quality

Economic Context

- Workloads are up
 - Growth of publishing
 - Mounting metadata demands
- Resources are down
 - Staffing

Scope of the Pilot Project

- Phase 1: February – June, 2005
 - Training in Descriptive cataloging
 - Intensive review of cataloging product
- Phase 2: July – September 2005
 - Authority work
 - Binding, labeling, security strips

Project Parameters

- **Descriptive metadata**
- **Maintain LC Standards:**
 - Core-level cataloging
 - MARC21, AACR2, DCM, SCM, LCRI, LCCS...
- **Vendor sources only**
 - LC will continue to do non-commercial
- **Less rowing, more steering for LC**

Project Impact

- **New workflow**
- **New kind of partnership**
- **Variation on quality review theme**
- **Re-division of labor**

Sample Records

- **Acquisitions & Bibliographic Access Directorate**
 - Received 76-item sample of monographs with accompanying online records
 - Reviewed records to assess cataloging quality
 - Ongoing briefings to Labor Organizations

Review of Sample Records

- **Potential for good cataloging**
 - Records consistent and accurate
 - Subject cataloging and full LC call numbers
 - review only needed, no training
 - Descriptive cataloging
 - requires training and review

Book Vendor Deliverables

- Shelf-ready cataloging records should be shipped to LC separately from IBCRs
- Prepare e-files and initiate FTP according to LC specifications
- Work with LC to develop means to automatically create holdings and item records during file load
- Search LC WebOPAC and LC Authorities
- Mark all monographs with source stamp
- Apply LCCN and item barcodes

Book Vendor Deliverables continued

- **Conform to core-level cataloging**
- **Prepare descriptive and subject cataloging and LC classification according to AACR2, DCM, SCM, LCRI, LCCS...**
- **Signal the need for authority work in the 952 field**
- **Complete shelf number for items**
- **Provide link to table of contents**
- **Subscribe to Cataloger's Desktop and Classification Web**
- **Prepare 1,800 records during Phase I of the pilot**

LC Provisions

- **Training for book vendor staff (2 weeks)**
- **Full review of records (1800 records)**
- **Feedback**
- **Quality control**
- **Authority work and database maintenance (BFM)**

Future Deliverables

- **Book vendor will work with LC staff to develop books preparation procedures**
 - **Binding and labeling, security strips**
- **Book vendor will maintain quality standards and controls**

Timeline 2004-06

- | | |
|------------------|---|
| ■ December 2004 | Establish project team, Report to BAMS and complete draft agreement |
| ■ Jan-Feb 2005 | Finalize agreement, for Phase I, develop training syllabus, discussions with AFSCME |
| ■ Feb-March 2005 | Training in Florence |
| ■ March 2005 | Test loading of FTP files |
| ■ April 2005 | Record submission and cataloging review begin |
| ■ June 2005 | Review complete, evaluation and final report of pilot |
| ■ July 2005 | Negotiate contract for Phase II |
| ■ September 2005 | Negotiate contract for Phase III |
| ■ January 2006 | OCLC signs contract with Casalini |

Training

- **By LC staffer**
 - **AACR2 and RI Basics**
 - **MARC21 format**
 - **Interpretation of LC authority records**
 - **Workflow and searching**

Review and Quality Control

- **2,200 records**
- **Full review during 1st and 2nd phases of pilot**
- **10% review in Phase III**
- **Evaluation of quality**

Lessons Learned

- **Review process is very labor intensive. Select a review coordinator who can serve full-time**
- **Select a sufficient amount of staff to provide the review and feedback**
- **Make sure to include catalogers who can cover the full span of the classification schedule**
- **Make the work a priority above all other assignments**
- **Spend more time on the training process**
- **Have a backup trainer and extend the training period**
- **Choose a vendor who has staff equivalent to those found at your institution**
- **Collaboration with other institutions is critical**

Next steps

- .Bring Casalini to independence in bibliographic and all authority records**
- .Work out an improved method to signal BFM to CL when records are updated at LC**

Questions?