

First I want to thank Diana and her colleagues at the University of Washington, Bill Jordan and Steve Shadle, for helping my OCLC colleagues and me start rethinking maintenance of records in WorldCat.


But we can't begin to think about the future without thinking about where we've come from and where we are currently ...

## Decentralized maintenance



- 1974: CONSER Program
- 1984: Enhance Program
- 1985: Minimal Level Upgrade
- 1991: Database Enrichment
- 1993: CIP Enhance Program
- 1995: National Level Enhance Program
- 1995: Program for Cooperative Cataloging

For almost all of the existence of WorldCat, OCLC staff have been dedicated to maintaining it. And, for much of that history, there has also been a tradition of decentralized and collaborative maintenance. That tradition began with the CONSER Program in the mid 1970s and has grown to include a mixture of activity both within the OCLC membership and in cooperation with national- and international-level programs.

Records "touched" 		
	FY2007	FY2008 (1 <sup>st</sup> half)
OCLC member libraries	354,669	195,449
OCLC staff	2,323,287	1,283,325

It may also be useful to get a sense the volume of activity during the last fiscal year and the first half of the current year. The "member library" activity includes Database Enrichment, Minimal-level Upgrade and Enhance activity. The level of member library activity is certainly influenced by the number of libraries that make enhancements only in their local systems.

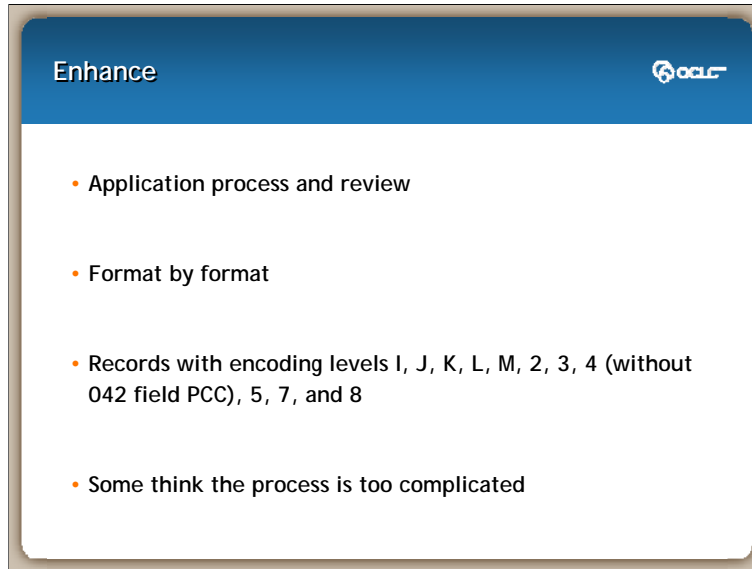
And, it may also be useful to look briefly at what each of those member library activities includes.

- Any full-mode Cataloging authorization
- Specific list of fields that can be added, edited and deleted
  - Currently 45 fields
- Records with encoding levels I, K, L, M, Blank, 1, 2, 3, 4, 5, 7, and 8

## Minimal-level upgrade



- Any full-mode Cataloging authorization
- Allows editing the entire record.
- Records with encoding levels K, M, 2, 3, 4 (without 042 field PCC), 5, and 7
  - Roughly half of WorldCat



The image is a screenshot of a presentation slide titled "Enhance" with the OCLC logo in the top right corner. The slide contains a bulleted list of four items:

- Application process and review
- Format by format
- Records with encoding levels I, J, K, L, M, 2, 3, 4 (without 042 field PCC), 5, 7, and 8
- Some think the process is too complicated

The application and review process focuses primarily on providing accurate access to information.

## Improving these programs



- Some things could be done easily:
  - Expanding the fields that can be touched in Database Enrichment
  - Reviewing the Enhance application process
- Some require more effort:
  - Reviewing and rationalizing the credit associated with each kind of activity
- *But ...*

*Do we need to take a step back?*





## Complex Technical Services Landscape

<b>Bibliographic Control &amp; Metadata</b>	<b>Desktop (TS Workstation)</b>	<b>Data Management</b>	<b>The Web</b>
New sources/types of records	Network, hardware and software administration	Relational Data Management	Authoring
New workflows	Transitions to new library systems (Windows, Web clients)	SQL: queries and reports	Publishing
New metadata standards	Macros; impt. of ergonomics	More data manipulation, less data entry	Web site organization and management
E-resources and digital collections	Growing number of applications	Global change	Digital library management systems

Calhoun, Karen. 2003. Technology, productivity, and change in library technical Services. *Library Collections, Acquisitions and Technical Services* 27, p. 281-9.

We're living in a much more complicated technical services landscape than we were when these distributed maintenance programs were set up ... And WorldCat is a much more complicated database that serves more purposes than it was in the past and the systems that support it could offer more options.

Before we apply what might be considered Band-Aids ...

# The “Quality” Debate



## Specialist's view:

- Fullness and detail
- Review every record

## Pragmatist's view:

- Speed and efficiency

## User's view:

- Easy, fast and convenient

... we need to take a look at the various views of “quality” within the OCLC community.

## Polarization: The Canyon Separating TS Practitioners (Experts) from TS Leaders (Pragmatists)



These views definitely represent one of those “chasms” that divides our community and, often, makes rational discourse difficult.

Just one aspect of that is what constitutes a “full” record ...

## Assumptions and Mindsets: What is "Full"?

**Bibliographic Information**

Australian Library Holdings

**Bibliographic Information**

Library Holdings Details  
Subjects  
Editions  
Reviews

**Product Description & Purchase Information**  
More like this

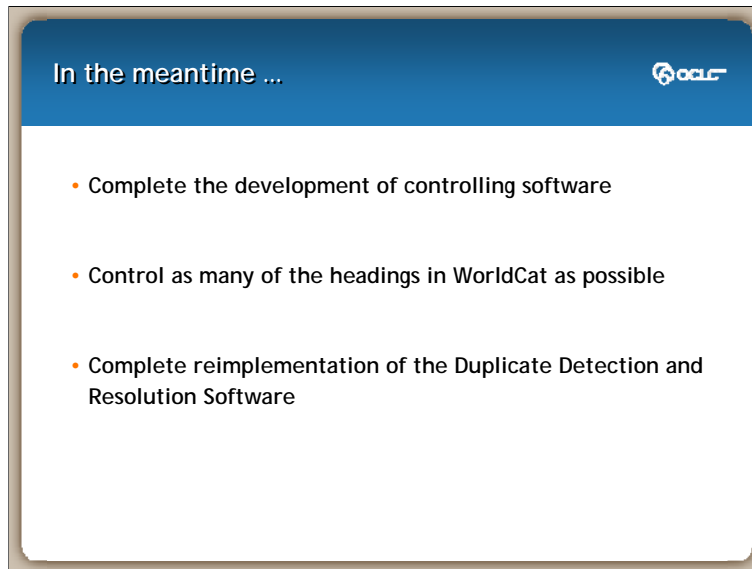
**Editorial Reviews & Author Info**

**Inside the Book**  
Tags, Ratings  
Customer Reviews  
Lists  
More

**+ 3 more screens**

**With thanks to David Lankes:**  
<http://quartz.syr.edu/rdlankes/Presentations/2007/ALCTS.pdf>

On the left, we see a typical OPAC display from Libraries Australia that represents what many would consider a full bibliographic records with holdings. In the middle, we have a WorldCat.org display in which the bibliographic data and holdings are supplemented by other editions of the same work as well as cover art and reviews. On the right is a display from Amazon.com with much more information (including 3 more screens not seen here). Which would our users consider to be the fullest record?



While we're having these discussions about quality, about the continued need for local editing practices and the master record and other points that our University of Washington colleagues raised — and reaching some level of agreement — there are some things we at OCLC are pretty sure that we need to do to improve maintenance at the network level.

It seems pretty clear that we need to complete the work that was started with the migration to Connexion to control as many headings in WorldCat as possible. It's these controlled headings that facilitate the FRBRization of WorldCat that is part of the WorldCat Local interface. Controlled vocabularies are also an important part of faceted browsing.

We also need to deal more effectively with duplicate records that complicate WorldCat, not matter what interface you're using.



So, we invite you to start the discussion with questions and comments for the panel. Please use the microphones and tell us who you are and what institution you are from.