

Restructuring the Cataloging Policy Committee to Tackle Backlogs and Support the Strategic Plan

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Outline

- Background
- Catalysts for Change
- From CPC (Cataloging Policy Committee) to CPPC (Cataloging Policy & Practice Committee)
- Cataloging Policy & Practice Committee

Background

- University of Washington Libraries
 - Member of Orbis Cascade Alliance (shared LMS - Alma)
 - System architecture: OCLC is database of record
- “Mostly centralized” cataloging/tech services
 - Cataloging and Metadata Services (orig & complex copy, metadata, database management)
 - Acquisitions and Rapid Cataloging Services (copy cataloging)
 - East Asia Library (CJK monos)
 - International Studies (non-Latin non-CJK serials)
 - Law Library (separate LMS/OCLC symbol)

Background

- CPC - Cataloging Policy Committee
 - Director of CAMS chaired; representative members rotated
 - Met monthly, open to all catalogers
 - Involved public services in past, but interest waned
 - Mission and charge focused on cataloging policy only
 - Few agenda items because UW uses national policies
 - Commenting on/responding to national cataloging policies
 - Coordinating with Orbis Cascade Alliance on cataloging policy
 - Field cataloging policy questions from Alma/Primo Operations Group, others from Libraries

Catalysts for Change

- New staff
 - Director of CAMS (2018), AD for Collections & Content (2016)
 - New cataloger hires!! Yay! Wait...are we prepared??
- Daunting cataloging backlogs
 - Large, many, often involving difficult scripts/formats
 - Historically uncoordinated efforts to address
 - Need help in prioritizing from stakeholders
- New 2018-2021 [UW Libraries Strategic Plan](#)
 - Institutional framework for prioritization

From CPC to CPPC

CPPC - Cataloging Policy & Practice Committee

Rewrote Mission to include cataloging practice along with policy

- CPC Mission: “...serves as a forum for discussion, coordination, and recommendation of cataloging policies and practices affecting the University of Washington Libraries at the national, regional, and local levels...”
- CPPC Mission added: “...identifies pathways that enable catalogers to develop and maintain their knowledge and expertise to implement policies successfully in their work; and establishes best practices and guidelines for minimum and maximum levels of cataloging that meets standards, addresses backlogs, and ensures that the Libraries provides discovery to materials that support teaching and research in a timely manner.”

From CPC to CPPC

Added additional Charge elements for cataloging practice

- Workflows
 - ...to integrate and streamline workflows between cataloging units and other technical services units...
- Backlogs/other projects
 - To assess cataloging backlogs and develop strategies and priorities for reducing and managing backlogs...
 - To identify needs and establish priorities for retrospective, enrichment, and remediation cataloging projects to improve search and discovery...
- Training/education
 - To identify and plan cataloging training and education needs...

From CPC to CPPC

Added additional Charge elements for cataloging practice

- Communication/collaborative work
 - To consider and assess the impact of cataloging decisions, in particular backlog projects, on other departments and consult with stakeholders...
 - To be an interface for committees and individuals to consider implication of library projects on cataloging operations.
 - To facilitate discussion of cataloging issues, policies, and proposals of interest to Libraries Administration, library staff, and committees.
 - To act as a consultant and informational resource on matters related to cataloging for Libraries Administration, library staff, and committees.

From CPC to CPPC

- Membership
 - Co-chair model: Principal Cataloger and rotating co-chair
 - Director of CAMS ex-officio member
 - 3 types of members
 - Core - attend every meeting
 - Stakeholder - “audit” work of committee, attend as needed
 - Ad hoc - appointed as consultants by the committee
- Accountability
 - CPPC reports to Director of CAMS
 - Co-chairs and CAMS Director meet with AD for C&C twice per year
 - Report, strategize for next year, appoint new members

Cataloging Policy & Practice Committee

- Storming & Norming
 - Finding sweet spot for core membership
 - Information sharing without oversharing
- Focusing the new committee (AD for C&C)
 - Discuss CPPC alignment with Libraries Strategic Directions & Goals
 - Read and discuss “Transitioning to the Learning Organization”*
 - Principles of Community exercise

*Giesecke, Joan and Beth McNeil. “Transitioning to the Learning Organization.” *Library Trends*, vol. 53, no. 1, 2004, pp. 54-67. <https://digitalcommons.unl.edu/libraryscience/5/>

Cataloging Policy & Practice Committee

- First year of work
 - Created Cataloger Training Checklist
 - Points to internal and external documentation
 - Created Cataloging Functional Directory
- Next up
 - Update cataloging backlog list (Google Sheets → Zapier → Trello)
 - Develop prioritization rubric for backlogs
 - Start prioritizing cataloging backlogs

THANK YOU!

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