BIBFRAME and the Technical Services Manager: What to Do Now?

Technical Services Workflow Efficiency Interest Group

ALA Annual, Orlando

June 27, 2016

by

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Topic

- **With the ongoing development of BIBFRAME (BF), libraries are starting to think about positioning themselves to operate in the world of linked data**

- **BF implementation will drastically change the current workflows and processes in cataloging departments**

- **How should catalog/metadata managers prepare?**

Cataloging Departments

- **Most cataloging staff will not be performing their current jobs in the same way 10 years from now**

Areas of Focus

- **To successfully prepare cataloging departments for BF and linked data, managers need to focus in these areas:**
  - **Communication**
  - **Education**
  - **Staffing**
  - **Outreach and Marketing**

Consider the User Perspective

- **We need to fit library in the life of the user, not the other way around**

- **User information gathering behaviour**
  - **Google/mobile impact and queries**
  - **Unaware of existing library services since they do not fit into their workflows**

- **Library linked data will change this**

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Catalog Managers and Data

- **Need our data to become essential in user workflows**

- **Data must be of sufficient quality to develop effective services**

- **Managers need to make sure their department's skills and services are identified, enhanced, and marketed effectively**

How Do We Get There?

- **There will be major changes in how technical services operates on many levels**
  - **Staffing**
  - **Management**
  - **Tools and Standards**
  - **Partnerships**

Evolution of Traditional Technical Services

- **Traditional breakdown (acquisition, serials, cataloguing)--disappeared**
- **Replaced by:**
  - **Knowledge access management**
  - **Metadata services**
  - **Discovery services**
- **Now comes a new shift with BF**

Leadership Opportunity: Planning Change

- **To ensure a successful transition, technical services managers must take on the responsibility to manage the change process**

- **Staff must be hired and/or retrained to perform tasks required of them when using new processes and workflows**

Communication

- **Departmental focus will shift to the creation of high quality linked data**
- **Managers must:**
  - **Be comfortable with the change process**
  - **Be honest in their commitment when relating their vision to staff**
  - **Insure that staff have an honest belief in usefulness and value of this change**

Education

- **Effective managers will need to know the basics of linked data and the semantic web to be able to communicate its value**

- **Familiarity with**
  - **RDF/XML and RDA**
  - **Ontologies**
  - **Database structures (triple stores)**
  - **Tools and BF editors**

Education (2)

- **Library of Congress has put out free training materials on the BF website**

- **Also, managers must familiarize themselves with various pilot projects working with linked data globally (eg. LD4P)**

- **This familiarity will help you with marketing and visioning**

Staffing

- **BF implementation will require that the department have a competent technical staff**

- **Managers need to carefully look at the retraining and/or hiring process and should focus on bringing in and retaining the necessary skill sets**

Competency in the RDA Standard

- **Catalogers and staff will need to break away from MARC and work totally in RDA**
- **RDA is international in scope**
- **RDA has its own vocabulary/ontology**
- **RDA constantly evolves and the BF model will also continue to evolve to better align itself with RDA (LC BF 2.0 pilot is an example)**

Staff Programming Skills

- **Staff need to have ability to work with both small and large datasets**

- **Need functional knowledge of**
  - **RDF/XML**
  - **And MARC21**

- **Need ability to use conversion tools such as BF converters, and even MarcEdit**

- **Important that this work be kept in the department**

Scripting Skills

- **You want staff that can work with at least one scripting language like:**
  - **Perl**
  - **Regular expressions**
  - **Macros**
- **Needed for automating workflows, designing web interfaces and online tools**

BIBFRAME 2.0 Model

- **Staff should have knowledge of the BIBFRAME model (work, instance, item)**
- **The next slide shows the overview diagram, taken from the LC BF website with the 3 core levels of abstraction:**

  https://www.loc.gov/bibframe/docs/bibframe2-model.html
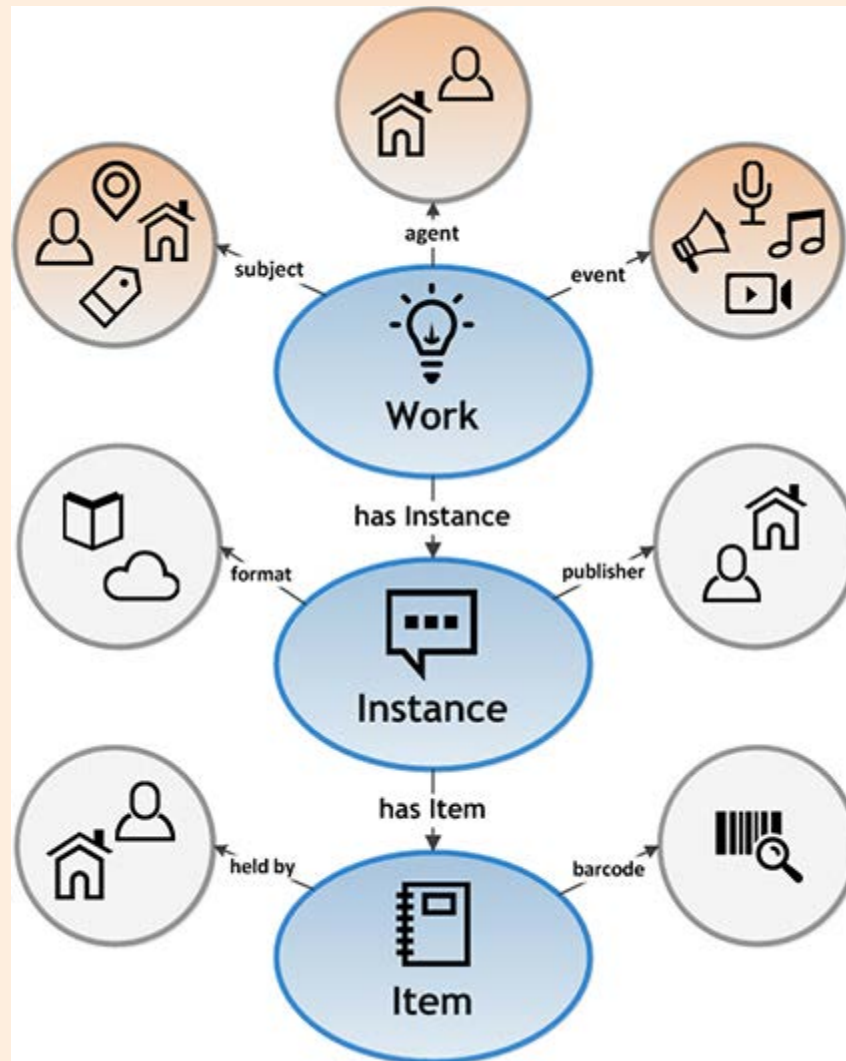
Linked Data 101

- **Staff must also understand the structure and concepts behind linked data**
- **Must have functional knowledge of**
  - **RDF (Resource Description Framework)**
  - **RDF triples (Subject—predicate—object)**
  - **RDF/XML**
  - **Use of specific ontologies/vocabularies**
  - **Triple store databases**

IT vs. Technical Services

- **Debate over whether linked data development should fall under the domain of technical services staff or systems staff**

- **Should be a balance between the two, library staff need to know the process to better develop services for users and linked data tools (BF editor)**

Other Staff Skills

- **Helpful if staff have functional knowledge of other metadata schema**
  - **METS**
  - **MODS**
  - **Dublin Core**
- **Useful for crosswalking and for data exchange**

Authority and Identity Management

- **You want competent staff that can create and contribute identity or "authority" records to national and international databases**

- **NACO participation should be part of staff training program. You have option to use funnels for training.**

- **Remember, in linked data everything must have an identifier**

Identity Management

- **Work not just limited to NACO. Other identity management could include**
  - **Orchid**
  - **VIVO**

Project Management

- **Your staff must:**
  - **Effectively handle new workflows and ongoing projects**
  - **Effectively manage various special projects**
  - **Effectively manage large amounts of data**
  - **Assist you in developing solid marketing and communication plans (documentation)**
- **Project management training should be a skill your staff possesses**

Training Plan

- **Managers also need a training plan**
  - **Identify skills currently available**
  - **Identify capability of existing staff to acquire new skills**
  - **Prioritize skills, identify gaps, establish timetables for training and hiring**
  - **Communicate and justify training programs to administration**

Marketing and Outreach

- **Managers must actively promote the benefits of the work done by their department**
  - Good for staff morale
  - Justification for funding
  - Community outreach
- **Involve or partner with other areas of the library, especially public services**

The Cutting Edge

- **Effective managers always monitor for new trends or services that can impact current workflows, both positive and negative**

- **Take on leadership roles, challenges and risks**
  - **Early adoption of BIBFRAME can be paired with staff training for RDA/XML and linked data**

- **Communicate and share results**

- **Do not fear failure**

Staff Success Reflects on You

- **You need to define levels of competency and quality for your staff, stick to them**

- **Provide staff with opportunity to advance professional careers; set up individual training plans and goals**

- **Involve staff at all levels in decision making. This is an opportunity for managers, not a threat**

Final Thoughts

- **Embrace the role as creators of linked data**
- **Help develop the systems and services that use them**
- **This can be accomplished by:**
  - **Strong and capable leadership**
  - **Bright, creative, well-trained staff**
- **BF may still be far in the future for many libraries, but never to early to prepare**

Questions

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