PRESIDENT'S MESSAGE

As your incoming President, I want to convey my greetings to all of our current members, and welcome new members to the Technical Services Chapter. There is a saying, to wit: May you live in interesting times. While I believe that may have negative connotations, it will certainly apply to the activities of our Chapter in the coming year in light of the restructuring of the California Library Association. As our Past President Diane Bebber wrote in the July 1991 issue of Tech Notes, our Chapter will have new challenges as this restructuring proceeds. My efforts on your behalf will be to implement the role of our Chapter in that process.

I have addressed the question of restructuring elsewhere in this issue. The immediate question for all of us, of course, is how we should proceed to apply for status within the new CLA structure. In Oakland I had the opportunity to discuss the options that are open to us with a number of members of the Chapter, and the consensus was that a planning meeting or meetings should be convened early this year, in a location that will be readily accessible to members in both Northern and Southern California, at which the various options can be discussed. Further information will be forthcoming as planning proceeds.

Included in this issue are reports on the Chapter's programs at the CLA Conference in Oakland. Special thanks are due to all of the presenters and speakers, as well as the Northern Region Discussion Group leaders who helped develop the three programs, and Diane Bebber, who critiqued these efforts throughout the planning process. We will miss her input this year.

Finally, I want to welcome all of our new discussion leaders, particularly those from Southern California. We also have a new editor of Tech Notes, Randy Brandt. Nancy Neal, who was the editor in 1991, deserves a special thank you from all of us for her efforts last year. My best to all of you in the new year. I look forward to working with you and encourage each member to provide input into the new structure of our Chapter as it evolves into a Section of the California Library Association.

Roy Ortopan, 1992 Chapter President

*******************************

HIGHLIGHTS OF THIS ISSUE

President's Message ............... 1
Roster of Officers ................ 2
CLA-TSC at the Annual Meeting.... 4
Restructuring the Chapter ....... 10
Upcoming Events ................. 11
ROSTER OF OFFICERS

President

Roy Ortopan
364 Valley St.
San Francisco, CA 94131-2323
(415) 648-4986

Vice-President/President Elect

Arlene Schwartz
Automated Circ. System Tech. Adviser
County of Los Angeles Public Library
7400 Imperial Highway
Downey, CA 90241
(310) 940-8553

Secretary

Vivian Pisano
Supervising Librarian of Technical Services
Oakland Public Library
Oakland, CA 94612
(510) 238-6719

Treasurer/Membership Coordinator

Ruth Boyer
Head, Catalog Department, General Library
University of California, Irvine
P.O. Box 19557
Irvine, CA 92713
(714) 856-6077

Tech Notes Editor

Randal Brandt
Map Room
137 Library
University of California, Berkeley
Berkeley, CA 94720
(510) 643-7163

DISCUSSION GROUP LEADERS

Northern Region Acquisitions
Discussion Group Leaders

Nancy Slight-Gibney
Orradre Library
Santa Clara University
Santa Clara, CA 95053
(408) 554-5430

Southern Region Acquisitions
Discussion Group Leaders

To be announced

Northern Region Cataloging
Discussion Group Leaders

Susanne Sweeney
Stanford University Jackson Library
Stanford, CA 94305
(415) 725-2005

Patricia S. Vanderberg
Catalog Department
212 Library
University of California, Berkeley
Berkeley, CA 94720
(510) 642-2329

Southern Region Acquisitions
Discussion Group Leaders

To be announced
Northern Region Microcomputer Discussion Group Leaders

Jessica Marshall
Associate Dean
University of the Pacific Library
Stockton, CA 95211
(209) 946-2434

Jack Kessler
School of Library and Information Studies
University of California, Berkeley
Berkeley, CA 94720
636 Douglas Street
San Francisco, CA 94114
(415) 282-4850

Northern Region Serials Discussion Group Leaders

Aimee Algier-Baxter
Santa Clara University
Santa Clara, CA 95053
(408) 554-5556

Armanda Barone
Serials Cataloging Division
Catalog Department
The Library
University of California, Berkeley
Berkeley, CA 94720
(510) 642-3331

Southern Region Microcomputer Discussion Group Leaders

To be announced
TECHNICAL SERVICES CHAPTER
AT THE ANNUAL MEETING

The Technical Services Chapter held three meetings at the Annual Conference in Oakland. The Business Meeting and the Program Meeting of the Chapter, Cooperation in the Technical Services, was held on Sunday morning, November 17. The combined Northern Region Acquisitions and Serial Discussion Groups sponsored a program, Interdependence of Libraries and Vendors, on Monday morning, November 18. On Monday afternoon, the combined Northern Region Cataloging and Microcomputer Discussion Groups sponsored a panel discussion, Quality of Library Databases. The following articles summarize the proceedings of these meetings.

******************************

CLA TSC ANNUAL BUSINESS MEETING
MINUTES
November 17, 1991

President Diane Bebber called the meeting to order at 8:32 a.m. She introduced the officers, President-Elect LeRoy Ortopan, Secretary Vivian Pisano, and Treasurer/Membership Coordinator Ruth Boyer.

Vivian Pisano gave a brief report of last year's meeting, stating there were no motions and no actions taken. She then announced the election results: members elected Arlene Schwartz as the Chapter's 1992 president.

Ruth Boyer presented the Treasurer's Report: the Chapter increased its treasury this year by $5,000: we began the year (December 18, 1990) with a balance of $6,000 and ended the year (October 31, 1991) with $11,021.33.

Ruth then reported on the membership: 352 members in 1991, down 6% from 1990. 184 (52%) are CLA members.

Diane Bebber delivered the President's message. As CLA begins its reorganization, Section implementation is the Chapter's main concern. By 1992-93, Sections must have at least 100 members, all of whom must be CLA members. Diane then introduced Celia Bakke, Technical Services Chapter's Section Convener, and Tom Carter from the Implementation Committee and asked them to discuss what Section implementation means for us.

Tom stated that the CLA members voted to approve the reorganization and adopt the new bylaws. Chapters will be dissolved next year and replaced by Sections and Roundtables.

Sections will have representation on the Assembly, CLA's governing body. Roundtables must have a minimum of 20 members, all CLA members; they have no representation on the Assembly.

All Section incoming funds must be submitted to CLA. Sections must apply to CLA to request funds for programming. Details are not yet worked out. Chapters may spend their current treasuries as they wish.

Chapters will continue as is through CLA 1992. Beginning in 1993, CLA members may belong to one Section or Roundtable for free and must pay for additional Section and/or Roundtable
memberships.

A member of the audience asked whether there would be a parallel group for non-CLA members. The California Technical Processes Group (CTPG) was mentioned as an option.

Diane stated that she was an advocate of the reorganization, but that there were several issues that were unclear: How will our present Discussion Groups fit in? How will our affiliation and program coordination with CTPG be affected? What will be the result of CLA handling the funds? Will our programming be affected? One of our strengths is our programs, their number and quality.

Diane then thanked the Chapter's discussion groups and the Program Committee, chaired by Roy Ortopan, commending them for the number and variety of programs they organized.

President-Elect LeRoy Ortopan delivered his message. He thanked the discussion groups for their fine programming. The theme of the Northern Region discussion groups' programs was the need for cooperation among all types of libraries; this is also the theme of the Chapter's program following the business meeting.

Diane Bebber adjourned the meeting at 8:55 a.m.

Minutes taken and submitted by Vivian Pisano, Secretary.

-------------------------------

COOPERATION IN TECHNICAL SERVICES
November 17, 1991, 9:00 a.m.-12:00 noon

Kay Thorne, San Jose State University Library: California State Serials Project

Kay Thorne stated the Network Serials Task Force was formed in 1988 to recommend a model for a statewide serials network. The Task Force first identified the existing union lists, including CALLS, CULP, and SERLINE. Fifteen models were described and 12 were taken to the constituents for review. The 12 were narrowed to 6; of these, people preferred models 5 and 6.

The Task Force recommended a model that incorporates models 5 and 6 and makes use of the master record concept. In the first phase of this model, unique numbers would be assigned to California titles and the best bibliographic record would be attached to the CALLS title in Melvyl. A service bureau would provide training and update and add records to CALLS.

In Phase II a permanent network host would be identified. Capacity, access, ownership, variety of services, cost, and online access are all factors to be considered in selecting the host.

Records will be entered in the serials network in the following priority: periodicals and journals, newspapers, and annuals, indexes, and monographic series.

In Phase III the records of libraries not in any union lists will be added.
Kay then identified some implications of the network model: Local libraries will use the same method of input they use to input records to union lists. For example, libraries that contribute to CULP will continue to input records in the same way; CULP is then responsible for entering the records to the database. Byproducts will continue to be available. Ongoing costs must be supported by funding. During the question and answer period, the status of the newspaper project was discussed. Monies have been received and the project has begun. There are approximately 15,000 California titles to be included in the network.

Charles Piazza, EBSCO: X12 Standard

Charles Piazza discussed EDI (Electronic Data Interchange) in serials management and stated the challenges in implementing EDI are data translation and data communication. Why then do we have standards? Because it is too costly to develop unique systems.

There are two groups actively addressing EDI X12 standards (X12 is the standard for format of data): ICEDIS (group of publishers and subscription agents) and SISAC.

Clifford Lynch, Division of Library Automation, University of California: Future of Networking for Cooperation in Technical Services

Clifford Lynch's scenario of the future is that it will be heavily networked among libraries, users, and suppliers; libraries will expand their roles of information retrieval systems; and users will increasingly be equipped with technological equipment.

He talked about the contrast between automation efficiency and fundamental change. In the 70s and 80s, we automated internal functions. These changes made our internal processes more efficient but made no difference to users.

We are now in the early stages of the impact of networks, and this constitutes a fundamental change. Today libraries deal with one supplier; in a network environment, libraries will be able to bid for supplies electronically, and thus fundamentally change the way we do things. Another impact networks are having on libraries is in interlibrary loan. We are currently experiencing a drastic increase in ILL traffic. And we are finding ILL to expensive and inefficient. However, we will soon see delivery of documents over the networks.

Another fundamental change we will see is in our model of collection development: whereas we currently acquire subscriptions, we will soon acquire on demand. Collection management (rather than development) will be a major area of change. Information will be delivered electronically, and paper will be generated on demand.

The question for the library will be what to collect? This is a longer term problem, particularly for the research library whose role it is to be a major repository for certain areas. We must be careful with the acquire-on-demand
model.

Clifford then identified some factors about electronic information:
1.) It is very expensive. High pricing means we will be forced to make more choices: we must select among similar but competing titles rather than acquiring them all. And, because publishers will sell a lot fewer books they will charge more.
2.) Its acquisition processes are complex: e.g., it requires signing license agreements.
3.) Coordinated acquisitions among librarians will need to be planned carefully.
4.) It will enable the acquisitions-on-demand model. We must decide how the end user will interact directly with us.
5.) The information will be updated more often.
6.) There will be a greater demand from users for libraries to deliver information in a timely manner.

He then discussed some of the implications of networks:
1.) Union lists.
2.) Multi-file integration, e.g., book reviews can be linked to bibliographic records.
3.) Full text databases. We must remember that access to the full text is not a viable replacement for cataloging. What will the model for full text access be?
4.) Cost is a big issue with abstract and indexing databases.
5.) Cataloging. Original cataloging will increase will increase, particularly for non-print one-of-a-kind material, such as art works. Who will do the cataloging? What are our models for cataloging? What are the effects on the national databases of our increase in the use of local systems?
6.) Because storage is cheap, there will be a lot of duplication: information will be replicated for different functions.

In sum, networks are real and ubiquitous.

Submitted by Vivian Pisano.

******************************************************************************

INTERDEPENDENCE OF LIBRARIES AND VENDORS
November 18, 1991, 10:30 a.m.–12:00 noon

Nancy Slight-Gibney, moderator for the session, opened with some comments on the on-going series of programs that the Northern Region Discussion Groups have been holding on the interdependence of libraries and vendors and the efficiencies that can be created for both. This occurs through a willingness to work together cooperatively for mutual benefit; through the development of standards such as X12; and through the effective use of technology (the primary topic for this meeting).

Michael Markwith, Eastern Regional Manager, The Faxon Company, presented DATALINX, an automated system for accessing Faxon's serials files. DATALINX began as an internal system and continues as a means of accessing Faxon's internal business files. Users can obtain much information on serials titles including publication status and pricing information for 5 years. Information is also available on
exactly what Faxon has paid for a title. MARC-S records are stored, potentially useful for cataloging; and keyword searching is a feature, a potential tool for collection development purposes. Plans are to link DATALINX with BookQuest and SerialsQuest which may help with locating replacement copies for missing issues.

Rose Mendoza, Head, Serials Records Division, Stanford University and Rose Adams, also from Serials Records at Stanford, described their library's use of DATALINX. Stanford has 30,000 active serials titles. They have 20 staff members and each has a computer terminal at their desk with network access to DATALINX. The staff uses DATALINX extensively for researching title changes, publication status, date due, publication information, price, etc. (it is more convenient than searching Ulrich's!). While it is not terribly user-friendly, they all have learned to use it very quickly.

O.B. (Ben) Johnson, General Manager of the Northwest Regional Office, Ebsco Subscription Services, spoke about Ebsco's online service, EBSCONET. Like DATALINX, EBSCONET can be used for searching, ordering, claiming, and e-mail. Orders are routed back to the regional offices for processing. Claims are printed and sent to the publishers on Tuesday and Friday nights (rush claims should be phoned in). One unique feature of EBSCONET is the Missing Copy Bank, where libraries can obtain, for free, missing issues of popular serials. Of interest to collection managers is information on where titles are indexed and future plans are for EBSCONET to include the ISI impact factor.

Nancy Slight-Gibney described briefly Santa Clara University's use of EBSCONET for ordering, claiming, searching publication status, verifying title changes, and obtaining issues from the Missing Copy Bank.

Following the formal presentations, Jack Kessler, a researcher at the University of California, Berkeley, provided a hands-on demonstration in using the Internet to search other libraries' catalogs.

Submitted by Nancy Slight-Gibney.

QUALITY OF LIBRARY DATABASES
November 18, 1991, 2:30 p.m.-4:00 p.m.

"Quality of Library Databases" was the theme of a panel discussion sponsored by the Northern Region Cataloging and Microcomputer Discussion Groups. The discussion was presided over by Suzanne Sweeney, Jackson Library, Stanford University. Panelists included: Claudia Chester, John F. Kennedy University Library; Mary Olson, Technical Services Librarian, College of Marin; Pat Thomas, Head Cataloger, Stockton-San Joaquin County Library; and Dorothy McPherson, Division of Library Automation, University of California.

Claudia Chester spoke about the retrospective conversion project that JFK University Library has been engaged in using MARCIVE. They began the project 2 years ago and are now nearly ready to open their OPACs. Ms. Chester noted that the MARCIVE
database has high quality records, but a low quantity of them. JFK sent approximately 22,000 titles to MARCIVE for conversion; MARCIVE found approximately 17,900 of them. The items not found included older titles, foreign, small, and university press items, and California State publications. MARCIVE needs to have an ISBN or LCCN in order for them to convert the title. Ms. Chester also stressed the importance of weeding the collection before beginning a recon project. This is also a good time to apply barcodes and/or security strips to materials. The cost of MARCIVE is $0.52 per hit and $0.85 for "no-hits," which MARCIVE forwards to UTLAS for possible conversion. Overall, JFK Library has been very satisfied with the service they have received from MARCIVE. The error rate on the part of MARCIVE has been extremely low. Pat Thomas discussed the Stockton-San Joaquin County Library's experience using the OCLC Cat CD450 CD-ROM for cataloging. The library has been an OCLC user since 1978 and they have been quite satisfied with the service. They have found it cost-effective; the library catalogs approximately 12,000 titles per year and most of them are on Cat CD450. There are some problems, however, using Cat CD450 for cataloging. It is impossible to export or download authority records; the hit-rate goes down as the CDs get older (at present, they are updated quarterly); the documentation is not great; there are too many small steps; and dial-up access is still through the First System, not PRISM.

Mary Olson spoke about the retrospective conversion project that the College of Marin Library has been doing using Micro-Con Software. Micro-Con is OCLC software that performs batch recon without using OCLC. Searches are made on the First System, not PRISM. The College of Marin Library has found this service very cost-effective: $1.00 per record; $0.40 for recon; $0.20 for updates. The library has experienced an extremely high hit-rate of 99%, with only 1/4 of 1% requiring original cataloging. Ms. Olson also stressed the importance of the collection being weeded and inventoried (which the library did not do) before beginning recon. She also advised librarians to learn the process thoroughly before trying to teach it to anyone else. Dorothy McPherson discussed quality control in the Melvyl database, and in union catalogs in general. Melvyl is used primarily for public access and the records are not editable once they are added to the database, so high quality records are extremely important. As a union catalog, DLA relies on the inputting institution for quality control. Standards play a fundamental role in quality control. Each record must meet at least the minimal standards. Ms. McPherson also stressed the importance of authority control in a high quality database. Authority control is extremely important for the user to be able to take advantage of the cross-reference structure available in authority records.

Submitted by Randal S. Brandt

********************************************************************