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The past is a foreign country: transforming a Bibliographic Services team from copy cataloguers to metadata creators

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Fans of L.P. Hartley might recognize that the title of my article is taken from the famous opening line of 'The Go-Between', published in 1953. I chose this because the line 'The past is a foreign country: they do things differently there' (1) feels like an accurate description of how much both my role, and the work of my team, have changed in my time at LSE. So much so that the past really does look like a foreign country, and our work now looks quite different from how it did in December 2005 when I took up my post here.

Founded in 1895 LSE itself has a rich history as a specialist university for teaching and research across the broad spectrum of the social sciences. LSE Library Services began a year later in 1896. This paper fast-forwards just over 100 years, and focuses in on the second floor of the Library where more change was about to occur as the Acquisitions and Cataloguing teams merged to create the newly formed Bibliographic Services team.

This combined team meant that some in-house training was needed in order to help acquisitions staff with their cataloguing skills, and vice versa. Once this was complete, everyone was competent in copy cataloguing and in basic 'from scratch' cataloguing which was enabling the team to add 26,000 items to stock each year. The greater flexibility of the combined team meant that we were also able to carry out projects adding large collections of historic donations to stock.

While we enjoyed the challenges and successes of these changes, downstairs on the first floor, our Academic Services colleagues were also going through a period of change as the LSE Institutional Repository was developed. LSE Research Online, which we refer to as LSERO, began life in 2004 and 'aims to be a complete database of research created at LSE'. (2) Two of its key mission points are to 'include citations to the work of all LSE academic and support staff', and to 'provide Open Access to full text research where permitted by publishers and copyright law'. (3) The research is in the form of articles, working papers, datasets, books and book chapters, conference items, newspaper articles, research blog posts, etc, and at the time of writing, in July 2012, LSERO holds 23,494 citations, 6558 of which contain full text (though these figures increase every day).

All initial work on the repository was the responsibility of the E-Services librarian, based in Academic Services, and temporary project staff. When I joined LSE I inherited an RSLP (Research Support Libraries Programme) funded post working on LSERO, but at this stage, my line management responsibilities were really in a 'pay and rations' sense, while all repository related work was directed by the E-Services librarian. I had some input to development in terms of advising on metadata, but little hands-on practice with day-to-day workflows. As the repository continued to grow, more staff were appointed, including a repository manager in 2009, which took the total staffing level of the repository to 5.6 FTEs.

At this stage everyone involved in the repository was working on a bit of everything. Growth had been so rapid that it had not really allowed time to develop streamlined workflows across the increasing number of staff. Important decisions were noted down in a shared drive to ensure consistency, but there was not a stored body of instructions in the same way as we have with traditional cataloguing procedures. With LSERO continuing to grow there was a pressing need to scale up the processing of incoming material by streamlining the workflows so that a higher level of throughput could be consistently maintained.

Towards the end of 2009 the post I line-managed became vacant which gave us an excellent opportunity to think about making some changes. As a result we suggested that the workflows we had in place for our print materials should also apply to our digital materials, mirroring the existing responsibilities for print items between the Academic Services and Bibliographic Services teams. So academic liaison, content recruitment and advocacy would take place in Academic Services, while acquisition, processing and metadata creation would be done by the Bibliographic Services team. Not only would this mean that areas of expertise were exploited to best advantage, but for a service which had a cross-departmental workflow it would be clearer for line-managers to ascertain who was responsible for particular areas of work.

We also suggested that the vacant specialised repository post in my team was instead recruited as a general Bibliographic Services Library Assistant, and that then the entire team took on LSERO work. It would increase our flexibility to tackle changing workload priorities and also 'future-proof' the team by using their skills in following standards, checking data, and working with a high throughput of material while still maintaining accuracy and consistency.

It sounds a simple and straightforward proposal, but behind the scenes I had been doing a fair bit of number crunching to ensure that I thought we really could tackle this new dimension to our work, while not losing any of our efficiency in getting those 26,000 items per year onto the shelves.

Out of a 35 hour working week, one of my Library Assistants was spending an average of 12 hours a week on public service point duties, three hours on scheduled breaks and four hours on miscellaneous tasks (such as dealing with post and emails, or involved in training). So the full time LSERO post in Bibliographic Services had been contributing 15 hours a week, or three hours a day, to the work of the repository. With LSERO high on the agenda in the Library's strategic plan, the new proposal made an assumption that LSERO was a greater priority than cataloguing books which had been donated as part of big collections in the past. This did not mean we would completely abandon donations cataloguing, simply that we would spend less time on it. My statistics showed me that in the previous year my team had added 3098 donations to stock. Assuming those had taken an average of ten minutes each, that makes 516 hours spread across eight library assistants, so 64 and a half hours each over the course of a year. Divide that by 50 weeks (which takes into account closure days and bank holidays) makes 1.3 hours a week each, which multiplied by eight equals just over 10 hours a week as a team. Generously rounded up, that equates to two days. Two days, when we take into account the other tasks Library Assistants spend their time on, is equivalent to six hours of metadata entry. So, if we amalgamated the specific LSERO post into the Bibliographic Services, team, and added those 15 and six hours together, the team as a whole would be able to contribute 21 hours a week towards LSERO, while still keeping up with our acquisitions and cataloguing work. I would expect it to take a maximum of ten minutes to create a metadata-only record, so that would be a minimum of 126 records a week contributed to the repository, or a full text record would take 20 minutes, so that equates to 63 records. In practice, we are adding a combination of record types each week.

Having established where the time for LSERO work would come from, we needed to set up how it would be managed as a shared service between two teams. Academic Services and Bibliographic Services sit on two different floors of the building, so effective communication methods were going to be crucial, as well as setting out the work and responsibilities that each of the teams would have. The majority of our work arrives via a shared repository email inbox, to which academic staff email details of the research they want added to the repository. As multiple staff worked on this inbox, everybody had their own flag colour for clear identification of who was dealing with each request. An initial snag was that there were not enough flag colours to allocate one to each member of Bibliographic Services, though on reflection this turned out to be no bad thing. The Academic Services team would retain control of the inbox – they are the staff with the expertise in liaison, so they deal with all correspondence. That also takes into account that Bibliographic Services staff are in and out of the office around public service point duties, and they may additionally only spend one day a week on repository work, so if they took responsibility for replying to emails, there could be a lack of continuity for users. Instead emails are flagged green for us, by the Academic Services team, we work on the data entry and then flag an email purple if it is complete, or orange if there is an outstanding query. A purple flag tells the Academic Services staff that they can reply to say the work is added to the repository and then file the email, while an orange flag tells them some more liaison is needed before the work can be completed.

I had been mentioning the likelihood of Bibliographic Services getting involved in repository work for several months already, drip feeding the initial idea itself, the skills benefit it would bring to our team, and the opportunity it would give us to showcase the value of our skills to the rest of the Library, so by this stage the team were enthusiastic and ready to take on a new task. We revised the generic Bibliographic Services job description to incorporate the processing of digital materials, and we recruited someone to our vacant post. Now it was time to start the training. Having never done any LSERO data entry myself, I needed training first,

along with our senior library assistant (SLA) for cataloguing, so that we would be able to roll out training to the rest of our team. The team had little previous exposure to LSERO and repositories at this point, so initially we introduced the basic concepts, alongside the impact we expected it to have on the way we worked as a team, the amount of time we would spend on it, and the expectations about what we would achieve in that time. We then undertook practical training for the team in pairs which meant training could be tailored to different learning styles. This was backed up by the comprehensive documentation we prepared to go on our Group wiki. Written workflows are always a helpful reminder, and particularly in this instance as I wanted to avoid seeing our new Dublin Core skills appearing in the OPAC, or our existing MARC21 methods appearing in the repository! Other differences it was important to explain related to name authority control and classification. All the name headings in our Library catalogue are authorised against the Library of Congress Name Authority Files, but without an established source of external authorities to follow for the repository, the team had to be careful to check internal consistency when adding creator names. The more recent addition of a name authority file for LSERO has helped us greatly with this. The team are also used to checking or applying Library of Congress Subject Headings and Library of Congress Classification to catalogue records. LSERO works rather differently, combining both of these through a classification letter with a definition attached to it. This is a very broad subject breakdown and it has been strange to get used to classifying something into a broad set, rather than specifically. The plus point, of course, has been that we save an awful lot of time in authorising subject headings!

Initially I, or the SLA, checked every record which was created by the team, giving verbal feedback, explaining any mistakes and asking people to correct those themselves. Although this sounds a bit 'big-brother-esque', and although it can be tempting to make minor edits yourself, at this 'bedding-in' stage I knew that people would learn better from their mistakes if they had to correct them. Once we could see someone was creating records of a consistently good quality we moved to spot checking, and once we were happy that people were both creating high quality records and felt confident in doing so, they were able to deposit records themselves straight into the live repository. Because at this stage the whole team were learning and we wanted to keep an eye on how everyone was getting on, we did not instigate peer review checking, though that has been used since when we have been training new or temporary project staff. Basic metadata was only the beginning of the training. Over time this extended to dealing with full text materials and more complex item types, each time requiring more training and the production of more documentation for the wiki.

Over the last year my statistics show that we have spent an average of 24 hours a week on LSERO, so not a great deal more than the 21 hours we had originally planned to spend. However, we have less control over the peaks and troughs of LSERO than we do over accessioning and cataloguing, so in our lowest month we averaged 16 hours a week on LSERO, while in our busiest months we averaged 42 hours a week, which is double what we had originally said we could provide while still maintaining the 'bread and butter' kind of work a Library expects to come out of Bibliographic Services. Despite all the juggling we have had to do behind the scenes, as a team we have been very keen to demonstrate our flexibility and our ability to take on new challenges while providing a high quality service. We had a particular opportunity to do this in December 2010 when all 22 academic departments were asked to submit their post-2008 research to LSERO as soon as possible as part of REF preparation. (REF stands for Research Excellence Framework and is the means by which the quality of research in UK higher education institutions is assessed in order to inform funding.) In the space of three months nearly 5000 new citations were created (by us and Academic Services staff) which was an increase of around 20% of the total size of LSERO at the time (4), and proof that the Library was worthy of its central role in REF activity at LSE.

As a result of our LSERO work new opportunities continue to come our way. In summer 2011 electronic submission of PhD theses was approved by our Research Degrees Unit and these are being stored in a similar, but separate, repository called LSE Theses Online. Expertise in cataloguing print theses lies with the Bibliographic Services team, so it was natural that we would volunteer to be involved in populating LSETO. Over the coming year we expect to contribute to the creation of metadata for two additional proposed repositories for official publications and exam papers respectively.

My reflections as I look back are on what a big change this was for our team, but also on how successful it has been. The long run-in period allowing staff to get used to the idea of their work changing was beneficial, and the whole team are now trained to deal with LSERO metadata. In the last couple of years we have seen a slight decline in the amount of print material we receive, alongside a dramatic increase in electronic materials. Furthermore, our print processes have speeded up thanks to actions implemented as a result of process reviews. By using their cataloguing skills to become competent metadata creators the team have learnt that their skills are transferrable, compatible with the electronic environment and make a vital contribution to the strategic priorities that are met through LSERO. It has been encouraging to see the team take pride in that, and know that their skills are relevant and valued. By learning now to adapt our skills to keep up with the fast-changing environment in which we are operating we have, I hope, laid down the foundations necessary to 'future-proof' the team in changing times.

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