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From Specialists to Generalists

Issues and Perspectives on Cross-Training Catalogers

Kay G. Johnson Workshop Leader, **Michael A. Somers** Workshop Leader & **Peter C. Whiting** Recorder

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From Specialists to Generalists: Issues and Perspectives on Cross-Training Catalogers

Kay G. Johnson
Michael A. Somers

Workshop Leaders

Peter C. Whiting

Recorder

SUMMARY. This workshop gave a detailed account of the steps taken by the Technical Services Departments of two university libraries that were able to change their professional and paraprofessional staffs from a single task to a multiple task orientation using cross-training, development of consistent documentation, shared knowledge, core competencies and by increasing skills. These changes, although complex and sometimes difficult to implement, increased productivity and produced positive results at Louisiana State University and the University of Tennessee, Knoxville. [Article copies available for a fee from The Haworth Document Delivery Service: 1-800-342-9678. E-mail address: getinfo@haworth.com]

Kay G. Johnson is Assistant Professor/Original Cataloger, University of Tennessee Libraries.

Michael A. Somers is Chair, Technical Services Department, Kansas State University Libraries.

Peter C. Whiting is Cataloging Librarian, Prairie View A&M University.

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With increasing use of automation, cuts in personnel and shrinking budgets, it becomes necessary for libraries to examine, evaluate and ultimately reorganize their staff. A strategy for accomplishing this goal was presented to this workshop's audience of serials librarians.

Michael Somers (Kansas State University) began his presentation by giving a historical perspective of the Technical Services Division at Louisiana State University. When Somers arrived at Louisiana State University, the Acquisitions/Serials Services Department consisted of the following units: monograph acquisition, serials acquisition, microforms/newspapers, serials automation, bindery and preservation. Like the Acquisitions/Serials Services Department, the Cataloging Department had a traditional organizational structure, consisting of the following units: copy cataloging, database maintenance, serials cataloging, and original cataloging. The Serials Cataloging Unit primarily performed all the serials cataloging activities including analytic, complex and copy cataloging for serials.

A standard division of labor existed between the paraprofessional and professional staff. The paraprofessional staff was relegated to routine or repetitive activities, while the professional activities were based on using analytical skills. There was also a division determined by format type: monographs or serials, for example. The specialist's role was reinforced by retaining valuable information about particular tasks and how they were performed. There was a certain amount of duplication of work in different divisions, often disguised as quality control.

Somers then described the changes in the Louisiana State University Technical Services Division. An associate dean, who was already at the university library in another position, was appointed for Technical Services and he assumed the leadership role to guide change in the division. Financial Services Division was combined with Technical Services Division. In order to acquire materials and catalog them efficiently, the various technical services departments had to reorganize. A mandate was set to eliminate various duplications of labor. Solutions to this mandate were teamwork, staff mentor partners and teaching. Cross-training created shared knowledge that changed the work attitudes of the division. In the reorganization model, the Serials/Acquisitions Services and Cataloging Departments became the Technical Services Department. This reorganization brought together staff members. One goal was to reduce the number of times an item was passed around. Work loads were examined and analyzed. A number of task forces were created to look for duplication of effort and other inefficiencies.

Staff members worked together as a team to identify the strength and weakness of the department. Standards were identified and subsequently

training was developed to implement them. Each staff member was now responsible for specific tasks; responsibility for precise activities was emphasized. A beneficial result of cross-training was that staff members were encouraged to resolve problems and report their solutions. Another facet of teamwork was the mentoring of staff members. Such mentoring gave an opportunity for tenured librarians to interact with new librarians. For instance, the more experienced librarians could teach the new staff such duties as serving on committees or the process of professional development activities.

Writing documentation was emphasized so that procedures and guidelines could be consistently applied. Previously, there was little or no written documentation of procedures. Through shared knowledge, work flows were examined and cataloging specialists were transformed into cataloging generalists.

As a result of the old system, there was a large backlog. There was no systematic procedure for eliminating this backlog. In the serials department, there was a considerable backlog of gift material. Some of the serials were in languages that had no perceived value to the research and teaching faculty. A goal was established to process all material in a timely matter. The materials in the backlog that were discarded were done by evaluating and debating the historic and research value of the material for the library. Another solution for reducing some of the monographs backlog was to outsource it to TechPro. The cataloging staff was concerned about outsourcing material because they feared a loss of quality control, but within a year TechPro was able to reduce the backlog and the cataloging quality was consistently high. OCLC proved its ability to provide quality work.

Elegant work flows, severe or streamlined in their approach, enabled the elimination of duplications such as checking in materials in different units. Core competencies were a necessity and a series of orientations were created for the Technical Services staff. The orientations emphasized computer training so that everyone had the same basic knowledge. Thus all staff members had a common knowledge of the departmental services. Cross-training helped to improve the work flow. Staff members were trained in pairs so that two people would have the knowledge of each task involved. Serials were demystified so staff members would not be intimidated by their seemingly complex cataloging configurations. The introduction of format integration and MARC format tags made it easier to introduce changes to serials cataloging. Record selection guidelines were instituted to define monographs and serials. There was an effort to share procedures and to write documentation instead of merely using Post-it

notes. Peers trained each other. Serials catalogers trained monograph catalogers. Finally, cataloging librarians with better skills and a wider knowledge base improved their marketability, permitting the library to do more with less.

Kay Johnson, who is the Assistant Professor/Original Cataloger at the University of Tennessee, Knoxville, began her presentation by giving a historical perspective of the Technical Services Department and how it has evolved. Before Johnson arrived, the Technical Services Department was a highly specialized work place. In 1984, there were separate units for cataloging monographs, acquisitions and serials. There was no cross-training at this time. Five years later, the Technical Services Department reorganized. One of the changes was to shift serials cataloging into a cataloging team. The team consisted of a team leader with three supervisors. There was a supervisor for monographs, for serials, and another for database management. The total staff in the cataloging team was sixteen. The monograph and serials librarians also each supervised an original cataloger. All three supervisors supervised the adaptive (i.e., copy) catalogers.

Today there are still a team leader, a cataloging coordinator who is also an original cataloger, and three other original catalogers. The cataloging coordinator/original cataloger supervises the paraprofessional staff. Overall, the Cataloging Department has 14 people, but only 12 1/8 FTE. All catalogers work outside of the cataloging team in, for example, the music library or in collection development. Because of budget cuts, the adaptive cataloging staff also must work outside the cataloging team. One of the adaptive catalogers currently spends 1/8 of his time in government documents. Another adaptive cataloger spends half of her time in the Agriculture Department. So in comparison to 1989 when the cataloging team had 16 people, now in 1997 the department has shrunk to 12 1/8 FTE. There has also been a decrease in materials that are acquired by the library because of budget cuts. Work flow, however, has not necessarily decreased, since with increased automation there is also authority control and various special projects.

Johnson then went on to describe the philosophy of the Cataloging Department. Its primary goal is to have no backlog of material. However, because of a decrease in the cataloging staff, a backlog will inevitably occur. Another philosophy of the department is that a cataloging staff member should be able to catalog in all subject areas to cover for absences by other staff members. This objective demanded cross-training and writing pertinent documentation of duties. To provide a more efficient streamlined quality control cataloging procedure, the cataloging team has adopted some measures to catalog items properly. Computer generated

error reports detect duplicate call numbers so that the adaptive catalogers do not have to check for duplicate call numbers. To cut down the input in OCLC in order to shorten processing time or to follow local practices that deviate from standard cataloging rules, Tennessee materials are sometimes cataloged only on the local catalog system. Training in the Cataloging Department is carried out on a needs basis. Either a supervisor or an expert in a particular subject will do the training. In the past, there was a territorial attitude that only serials catalogers could catalog serials. There was an ingrained attitude that staff members had their own domain. While remnants of this attitude remain, most of the staff have an improved attitude towards cross-training. Another benefit of cross-training has been that catalogers have enjoyed learning about other formats; furthermore, the new challenges have brought refreshing variety to their jobs.

Thus, the current areas of specialization emphasize cross-training. Departmental supervisors work with library specialists in training and supervising. Adaptive catalogers still have some specialties, and original serials catalogers do have their preferences, including languages and subjects, but the goal is that each original cataloger possesses the ability to catalog all specialties. During 1994, a training program was started to cross-train staff members in Technical Services. The adaptive catalogers have been trained, for example, to help identify call numbers for music recordings. Johnson has emphasized a hands-on approach in training staff members. About a year ago, she planned to train the cataloging staff regarding serials identification, searching, cataloging, and maintenance. Serials training was cut short by system delays and library projects.

However, other problems have overshadowed the training of the cataloging staff in cross-training. Installation of a new computer system has been delayed. Also, all the support staff were audited for upgrades, obliging them to spend time on their job descriptions. The new library already has a shelving space shortage, and to compound problems, the State of Tennessee is now encountering budget problems. Last spring, the library staff had to cancel many serials because of budget cuts, and a functional review was instituted to reduce costs.

Within the last month, the Cataloging and Acquisitions Departments merged. The new computer system may finally be operational before the end of the year. Cataloging recently started a Web page where policies and procedures eventually will reside for easy access by the library staff. Documenting the cataloging procedures is not complete, but they are still being worked on by the staff in Technical Services.

Somers and Johnson presented two different experiences of changing cataloging staffs from specialists to generalists. The common thread of the

two talks was that knowledge and patience are the keys to a good cross-training program in a Technical Services Department. This excellent workshop left the participants with precise and practical ideas for the cross-training of catalogers and their transformation from specialists to generalists, so that they would be better equipped to face the problems of our times as well as those to come.