

## **Chapter 5 : Survey of education and training of cataloguers in South African university libraries**

### **5.1 Introduction**

The purpose of the study is to propose ways of improving the training of cataloguers in South African university libraries. Literature was studied to investigate the position of cataloguing practice worldwide. The findings are reflected in chapters two to four. The developments in this field, together with the knowledge and skills needed, were also observed.

A survey was conducted with the following objectives: to find out what cataloguers are doing; what education and training they received; and the present training needs as perceived by cataloguers. A survey as defined by Fink (1995: 1) is a method of collecting information to describe, compare, or explain knowledge, attitudes and behaviour. The results of the survey will be reported and analysed in this chapter.

Bailey (1996: 158) indicates it may be misleading to separate the section on data collection and analysis as they go hand in hand. This chapter will discuss the two aspects together.

### **5.2 Planning and compiling the questionnaire**

Data was collected through the use of a questionnaire. It was considered a relevant means of collecting data in this case as the population is geographically scattered in different parts of the country. Mail surveys have several advantages as indicated by Bickman & Rog (1997: 399) and Foddy (1993: 1), such as relatively low costs and allowing respondents to see the context of a series of questions. According to Foddy (1993: 1) "asking questions is widely accepted as a cost-efficient way (and sometimes the only way) of gathering information about the past behaviour experiences, private actions

and motives, beliefs, values and attitudes (ie. subjective variables that cannot be measured directly)".

Both closed and open-ended questions were used in the questionnaire. A mix of open and closed questions is recommended by methodologists like Kahn and Cannel, and Gullup as such questions complement each other ( Foddy, 1993: 152).

Errors can never be completely ruled out of survey research, but should be controlled in order to obtain a true reflection of the studied situation.

Reliability of a research instrument is important to obtain correct results. A reliable survey instrument is one that is relatively free from "measurement error" (Fink, 1995: 460). The questions asked were considered suitable to be understood by the respondents. Language used and aspects questioned are considered familiar to the daily work of cataloguers in their type of institutions, which are university libraries.

Some questions required related answers as a means of confirming the correctness of the answers.

The questionnaire is considered valid as it questions the position of training in university libraries in South Africa. This is the focus of the study. Validity is concerned with the degree to which a survey instrument assesses what it purports to measure (Fink, 1995: 49). It is important to measure a survey instrument's accuracy (Litwin, 1995: 34). The findings of this survey are considered valid as they give information relating to the objectives of the study. A number of successful studies were conducted in libraries in South Africa using this method (e.g. Agostinho, 1990:15-35). They studied subjects related to this study, namely personnel development and in-service training. Their findings support the position of training as found in this survey. The scope of the population of these studies was however not narrowed to cataloguers only.

### 5.2.1 Defining the research population

The population was constituted of all professional practising cataloguing librarians in twenty two South African university libraries. As libraries moves towards increased cooperative efforts, it is considered important to have a wide view of training in the country as each library contributes to the success of the shared work. Cataloguing done at each individual library is important to the success of the consortia and other forms of cooperatives.

### 5.2.2 Questionnaire content

The questionnaire was divided into three parts. Part A (questions 1 to 6) dealt with demographic information and other related variables. It was meant to establish the suitability of the respondents as targeted respondents. This data provided only background information about the respondents for the study.

Part B (questions 7 to 14) dealt with tasks performed, different duties performed by the respondents and how they evaluate their performance. It was considered important to have this information because cataloguers in different libraries perform different duties and experience continuously changing tasks, due to factors like technological developments and organizational or work restructuring. Only tasks regarded to be of primary importance were listed. This information does not answer the primary concern of the study but reveals the characteristics of the population, their tasks, their changing nature, and the training that needs to be provided for them.

Part C (questions 15 to 29) dealt with education received by cataloguers and the training status of different libraries. Education is considered to have an important relationship with on-the-job training.

The last part D (questions 30 to 35) asked about the specific needs related to respondents' work-related needs.

### **5.2.3 Distribution of the questionnaire**

A pilot study was conducted among nine cataloguers from the same library. A few ambiguous questions were pointed out and the questionnaire was reformulated before being sent out to the larger sample.

The questionnaires were mailed to twenty-two South African universities including the university of Namibia. The questionnaires were addressed to the library directors with a request to direct them to the relevant sections or individuals, taking into consideration that restructuring is continually taking place and cataloguing sections, in the traditional sense, might no longer exist. A covering letter was attached, explaining the purpose of the study.

### **5.2.4 Responses to the questionnaire**

Responses were received from eighteen of the twenty two university libraries which received the questionnaire. It constitute a 78% response rate. A summary of received responses is given in table 1. Four libraries failed to respond.

The response rate is considered to be representative of the population studied. University libraries experience the same challenges even though they operate in different environmental situations.

Non response error was very low in this study. Non response error is defined by Bickman & Rog (1998: 401) as failure of respondents to answer individual questions. He explains the problem as follows, "respondents leave questions blank, accidentally skip over items,

do not follow instructions and so fill out answers incorrectly, or write marginal comments that cannot be equated with your printed answer categories”.

### **5.3 Analysis of results of the survey**

The findings and interpretation will be presented in the same sequence as the questionnaire.

### 5.3.1 A : General questions

#### 5.3.1.1 *Institution where employed*

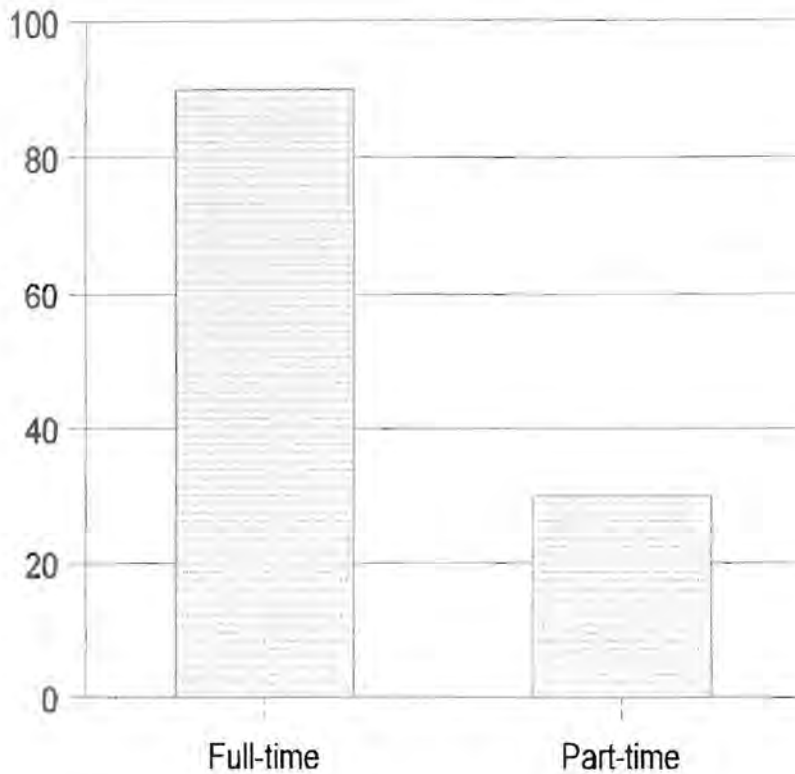
**Table 1: List of responses per institution**

Institution	Responses
Fort Hare	1
MEDUNSA	4
PU for CHO	5
Rand Afrikaanse University	4
RHODES	4
UNISA	16
University of Cape Town	12
University of Free State	7
University of Natal -PMB	8
University of the North	6
University of North West	3
University of Port Elizabeth	7
University of Pretoria	15
University of Stellenbosch	12
University of Venda	4
Vista	5
Wits	4
University of Namibia	3
<b>TOTALS</b>	<b>120</b>

As stated previously, the response rate was satisfactory. At each library a varying number of cataloguers responded. It is not known how many cataloguers are employed in each library. The percentage of actual cataloguers who responded is therefore not known.

5.3.1.2 *Position in the institution: Full-time or Part-time*

**Figure 2: Number of full-time and part-time cataloguers**

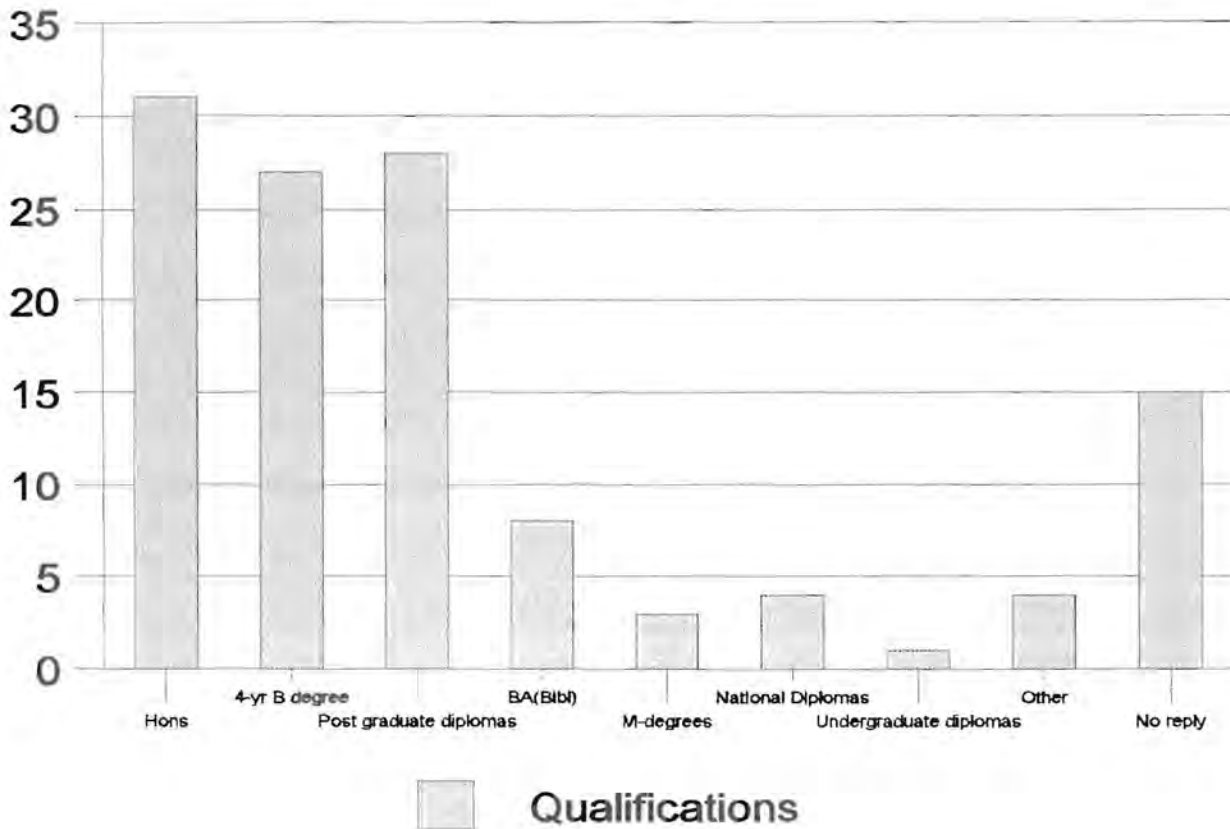


By far the most staff members are full-time cataloguers (75%), showing that in academic libraries at least, cataloguers are still regarded as important. Some cataloguers may work part-time as result of the decentralization of cataloguing, where they also have to perform other duties apart from cataloguing. It may also be because the amount of copy cataloguing done in a particular institution, reduces the need for a full-time cataloguer in some subject areas. Part-time cataloguers can also refer to people who only work half day. It can be that part-time cataloguers do not take part in training programmes.

According to this survey, there are 30 (25%) part time cataloguers in South African university libraries.. This can cause concern if they do not undergo the same training set for full time cataloguers.

### 5.3.1.3 Qualifications of respondents

Figure 3: Qualifications of cataloguers

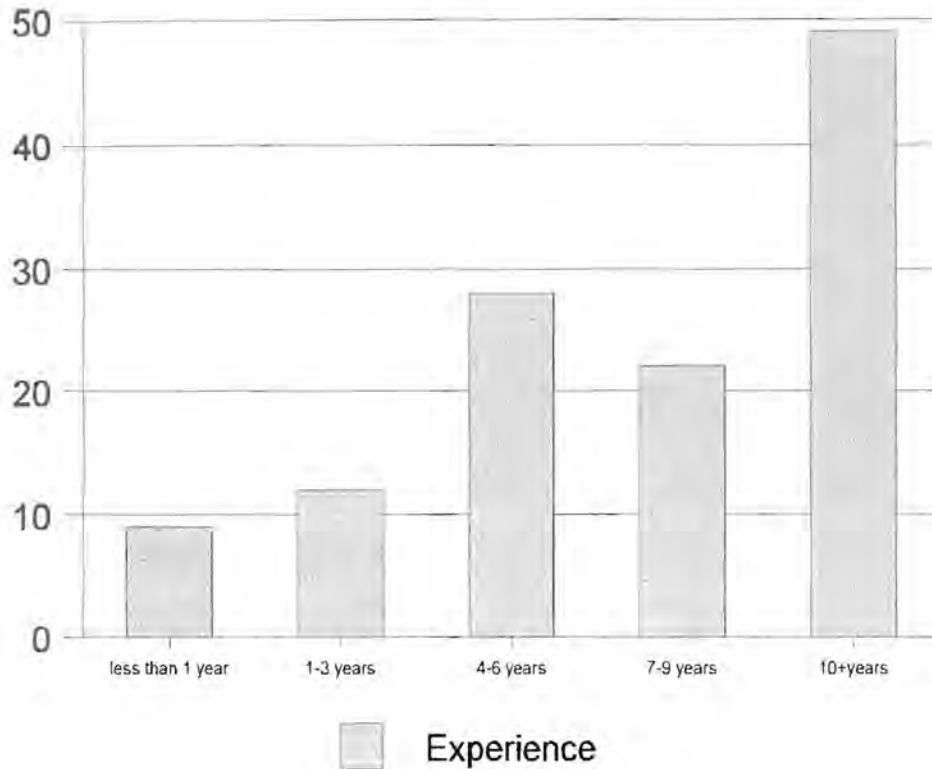


The findings show an amazing number of highly qualified cataloguing staff, mostly graduates. It is clear that cataloguing is still a professional job in South African university libraries. Cataloguers realize the need for improving their knowledge and skills, even through formal education. 31 (25.83%) respondents have senior degrees in librarianship and information studies and 2 (1.67%) have masters degrees. Work challenges probably cause the need for further education. Another motivating factor could be prospects for promotion. Those who did not reply to this question, are probably not qualified. The majority are almost overqualified.



### 5.3.1.4 Experience of respondents

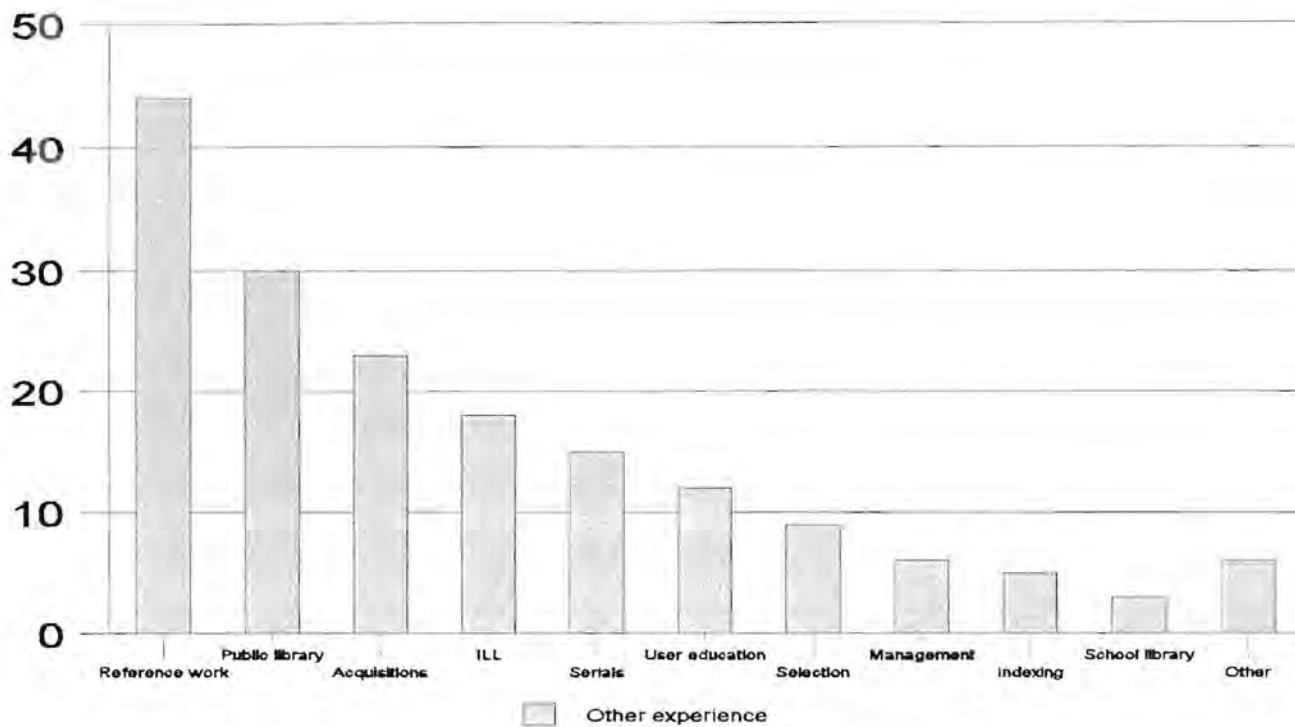
Figure 4: Experience of cataloguers in years



The response shows that cataloguers in university libraries are very experienced and have been cataloguers for a long time. Responses on evaluation of their education and training (section C of the questionnaire), can hardly be taken into consideration, because it was too long ago. If experience is a criterium, the quality of work records in catalogues should be high. There are however still complaints concerning the poor quality of cataloguing on shared catalogues like SACat. This might mean that the problem of poor cataloguing is not a result of inexperience only when 49 (40.83%) of the total respondents have been cataloguers for more than 10 years and 50 (41.67%) for more than 3 years. Only 21 (17.5%) respondents are fairly new cataloguers. It is interesting to note that there is work stability among cataloguers.

5.3.1.5 *What other (outside cataloguing) library work experience do you have?*

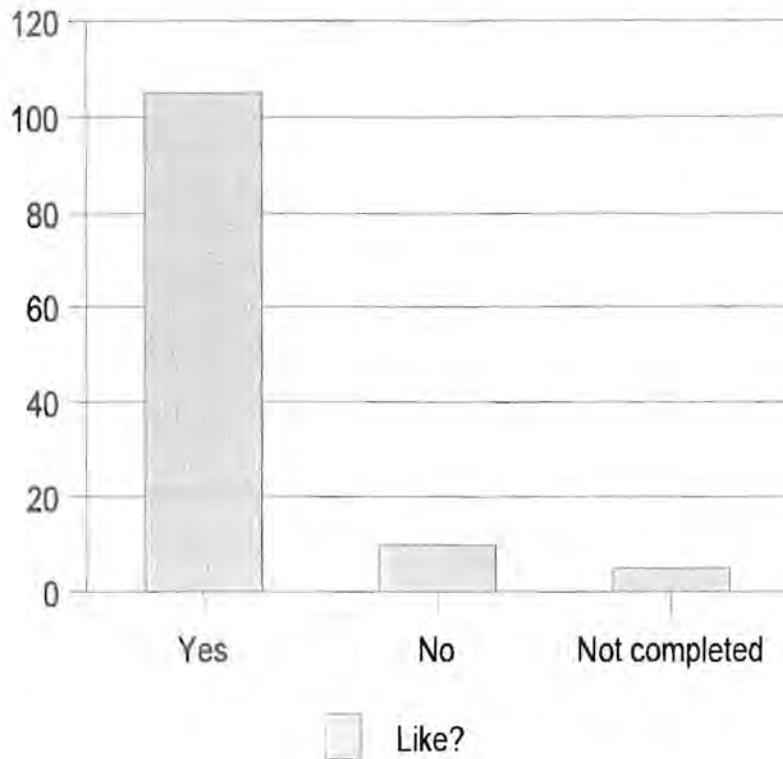
Figure 5: Experience other than cataloguing



Responses to this question were varied and difficult to analyse. There were no specific jobs stated as in question 11 and thus all other duties they have performed were entered here. The aim of the question was to establish experience that cataloguers have which could be of relevance to cataloguing. Respondents replied to this question in much the same way as to question 11. Concerning other experience outside cataloguing, it was found that most cataloguers have other experience apart from cataloguing. Forty respondents (33.33%) did or do reference work, which can be additional useful experience, regarding user needs. Cataloguers also often need to do research in order to compile a bibliographic record. Experience in reference work can be useful when looking for additional information from other databases. Some level of multi-skilling is an advantage.

5.3.1.6 *Do you like cataloguing work?*

Figure 6: Preference for cataloguing



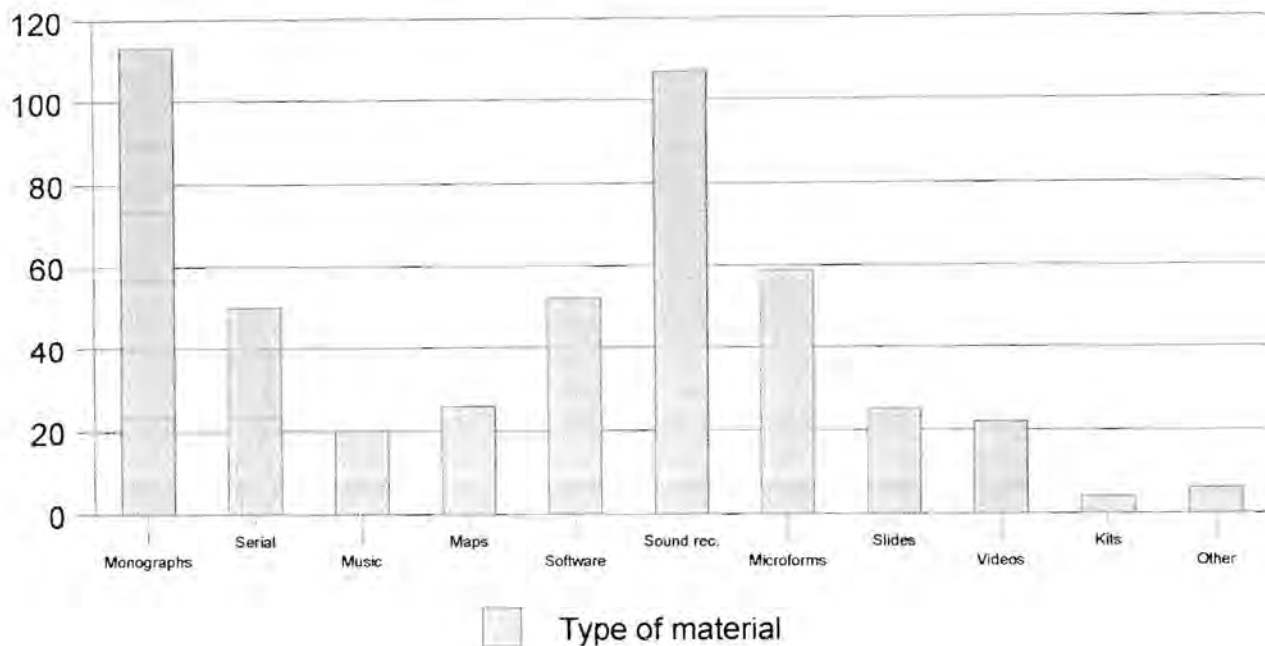
Most people doing cataloguing seem to like it, because 115 (95.83%) indicated that they like cataloguing. The general opinion as reflected in literature is that cataloguing is the least liked of library jobs. The findings of this study refute this. Attitudes seem to improve with experience in cataloguing. This contradicts the attitude of some practising librarians, that cataloguing is monotonous and not challenging. The findings confirm that when people get involved in cataloguing they grow to like it. It could be that those who have not catalogued for long, are the ones who do not like it.

### 5.3.2 B : Questions on task performance

This section is meant to establish only those duties that you currently perform.

#### 5.3.2.1 What type of library material do you catalogue?

**Figure 7: Type of library materials catalogued**

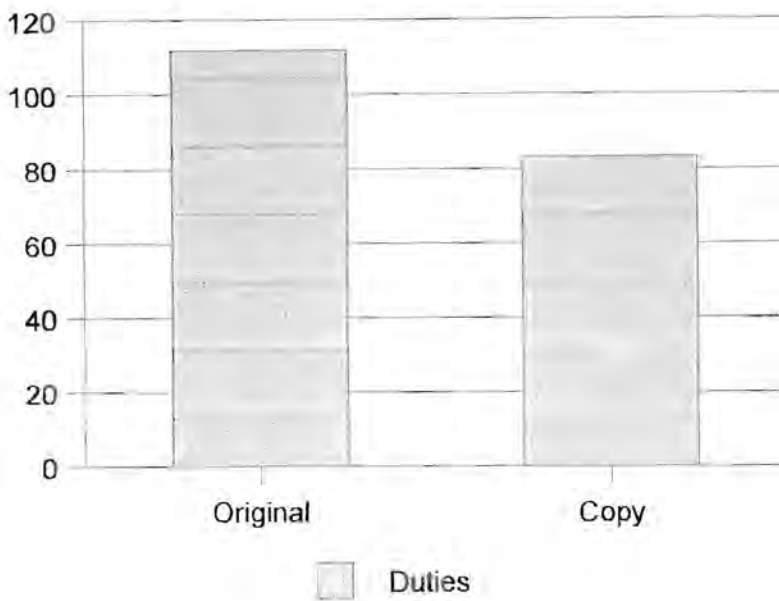


Cataloguers work with a variety of material that may differ from library to library. New formats are continually being added to the traditional print format. Monographs still form a significant part of material catalogued as indicated by 113 (94.17%) respondents. A variety of material formats are evidently processed by the same cataloguer as more than one category was marked. The large number cataloguing microforms is surprising, seeing that this medium is not very popular any more. Van der Walt (1997: 95) states that older technology like microforms still have useful applications and should not be ignored in training. Some specializing in cataloguing, either by material format (e.g. serial) or by

subject specialty (e.g. music), is being practised to a limited extent. About 7 (5.83%) appear not to work with monographs at all. Sound recordings and CD's were grouped together. Other forms such as software and other electronic formats are also being catalogued in large numbers.

**5.3.2.2 Which of the following duties do you perform? Original cataloguing or copy cataloguing?**

**Figure 8: Original or copy cataloguing**

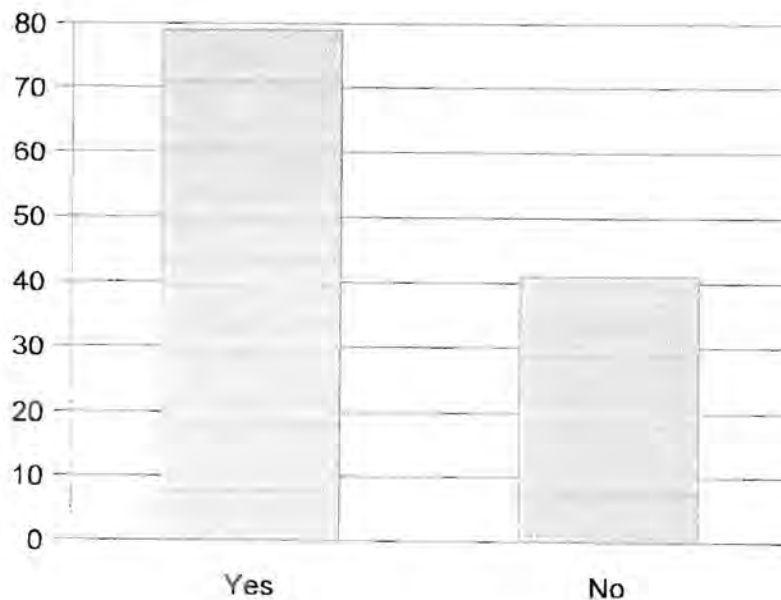


Original cataloguing is done by 112 (93.33%) respondents. A significant amount of copy cataloguing is also still done by the cataloguers, namely by 80 (66.67%). About three quarters of the respondents, do both original and copy cataloguing. Indication that more original cataloguing is being done than copy cataloguing, can be an indication that many libraries are not participating in cooperative efforts or are not using available records for copy cataloguing. It can also mean that some cataloguing is done by other staff and not by qualified cataloguers. All university libraries catalogue theses and dissertations of their own students and other locally produced reports and publications. This may also account

for the large number who do original cataloguing. The formation of consortia and other cooperatives aims to change this situation by reducing original cataloguing significantly and releasing professional staff from copy cataloguing. Eskoz's (1990) research on primary roles of catalogers indicates that changes are occurring, but the primary responsibility remains creation and maintenance of bibliographic records.

**5.3.2.3** *Is the cataloguing work divided into professional and paraprofessional in your library?*

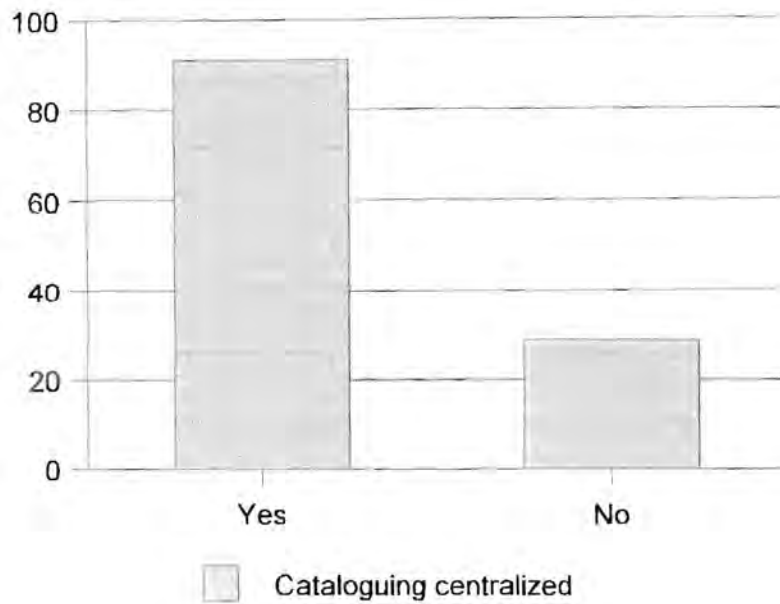
**Figure 9 :** Division between professional and paraprofessional work



In about twice as many institutions, professional and paraprofessional duties are separated. A list of what is regarded as professional would have been useful here, because many cataloguers might not make a clear distinction between these two categories. From responses to some other questions it can be deduced that many cataloguers do both.

5.3.2.4 *Is cataloguing in your library centralized?*

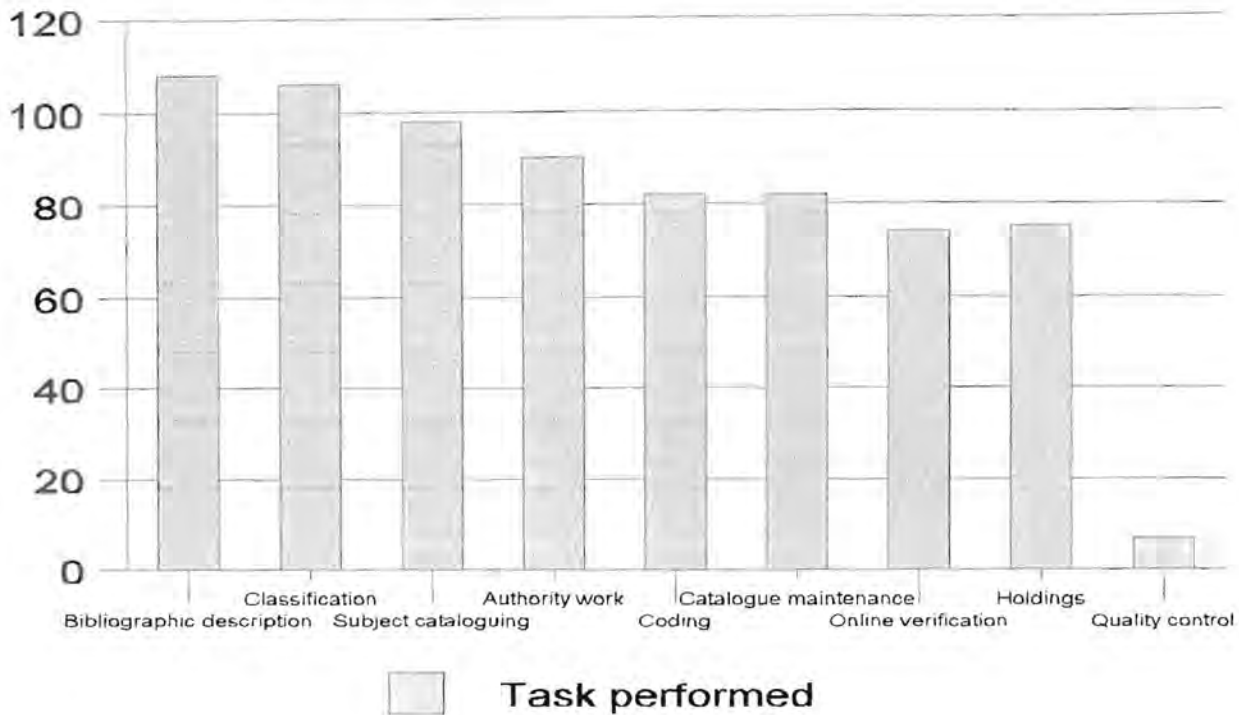
**Figure 10: Centralization of cataloguing staff**



From the response to the question, namely 91 (75.83%) it is clear that cataloguing is still centralised in most university libraries. This means that cataloguers still form a pool. Decentralisation could mean that cataloguing is distributed in service units. Only a few university libraries like Pretoria and Natal are at present operating in a decentralised way. They are reflected in the 29 (24.17%) who have answered “No”.

### 5.3.2.5 Which tasks do you perform?

Figure 11: Tasks performed



Respondents were asked to mark tasks on a list. Tasks performed by cataloguers are many and vary according to institutions and individual cataloguers. Most cataloguers marked more than one task. Bibliographic description, classification and subject cataloguing are the top three tasks performed by the cataloguers. Although it is indicated above that tasks are divided into professional and nonprofessional it is not practised effectively in actual operation. Tasks like catalogue maintenance (82 (68.33%)), online verification (74 (61.67%)) and holdings addition (74 (61.67%)) s are designated as nonprofessional in nature but are still performed by many.

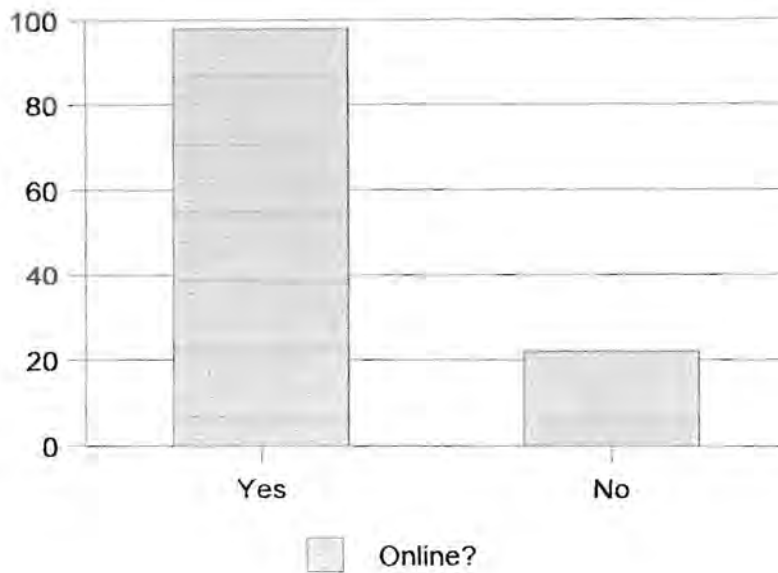
The instruction given, to specify other tasks, cataloguing or not, resulted in a list of other tasks which are not cataloguing tasks. All replies to this question indicating tasks other than cataloguing tasks, were analysed under question 5. Most respondents do what is



recognized as the common cataloguing tasks, with very few doing quality control. If only headings are verified, it is the same as authority control. If descriptions are verified, it should be copy cataloguing, which was not included in this list.

### 5.3.2.6 *Do you work online?*

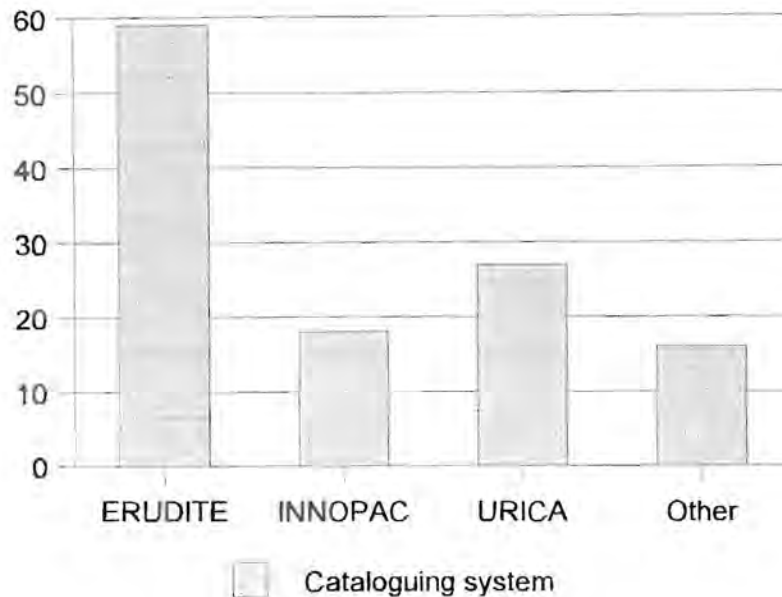
**Figure 12: Working online**



Some cataloguers, 22 (18.33%), indicated that they do not work online, contrary to general opinion. Maybe a question on how they catalogue if not online would have been useful. The general assumption is that all university libraries catalogue online.

### 5.3.2.7 Which system do you use for cataloguing (e.g. ERUDITE)

Figure 13: System on which cataloguing is done

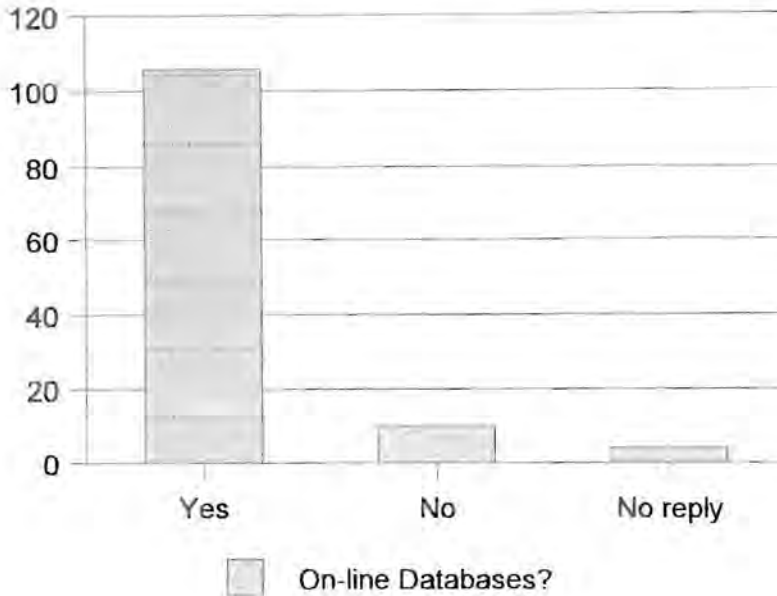


The question was meant to find out which systems (e.g. ERUDITE) are in use in the different libraries.

It seems however that not all respondents interpreted the question correctly. All libraries in which respondents work have automated systems. All the systems listed by respondents are integrated systems with cataloguing modules. Many respondents indicated ERUDITE and INNOPAC, because the questionnaire was completed in the transition period from ERUDITE to INNOPAC for members of GAELIC. the rest of the country. At the time the survey was done, ERUDITE was ranked the highest followed by URICA. The number of INNOPAC users will rise with many new libraries joining GAELIC in its third phase in 1999.

5.3.2.8 *Do you use other on-line databases for copy cataloguing (e.g. SABINET, OCLC, Promptcat, etc.)*

Figure 14: On-line databases used for copy cataloguing



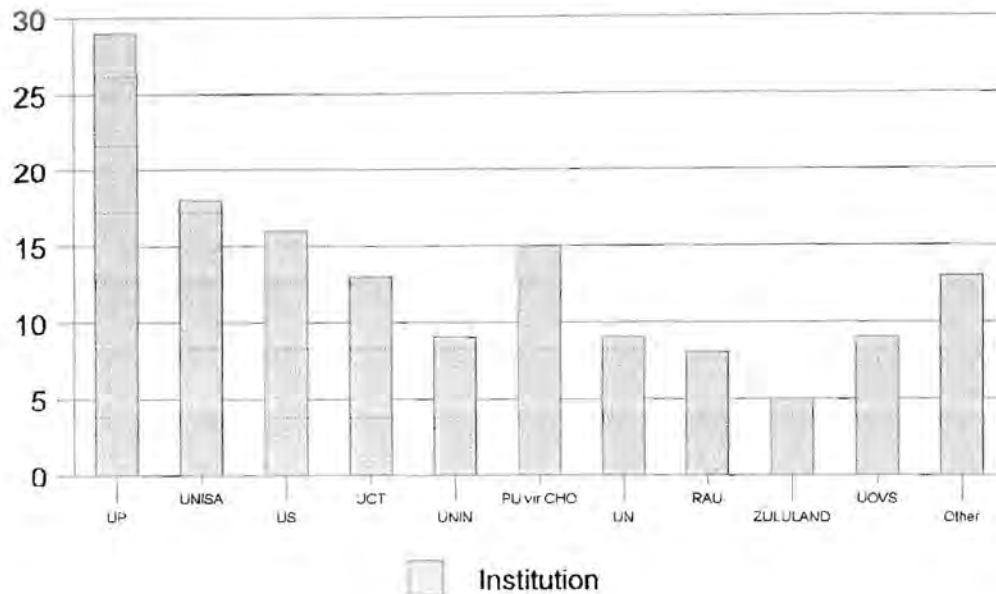
As to whether other online databases are used for copy cataloguing, 106 (88.33%) answered that they do . 10 (8.33%) respondents answered that they are not using online databases (probably SABINET) for copy cataloguing. It will be interesting to know why this is the case. Local deviations from standards could be the cause. It might also mean that records for a number of items could not be found in the databases consulted.

The names of databases used were not asked for. A list of databases which could be marked by respondents would have been useful.

### 5.3.3 C : Questions on education and training history

#### 5.3.3.1 *Where did you receive your librarianship education?*

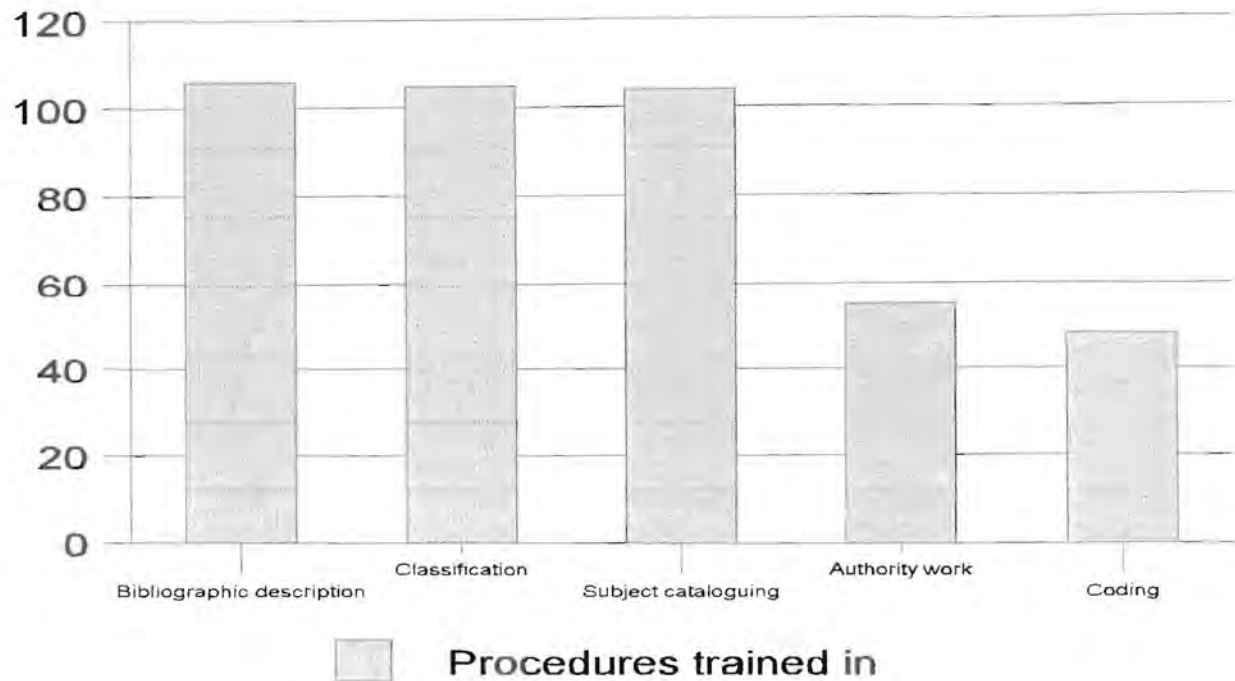
Figure 15: Institution at which education was received



The first question in this category established the institution where cataloguers received their education. The size of library schools vary and many have since ceased to exist. The University of Pretoria apparently produced the majority of practising cataloguers. This could be due to the high number of responses from the Pretoria region.

5.3.3.2 *In which cataloguing procedures did you receive education?*

Figure 16: Cataloguing procedures in which education was received

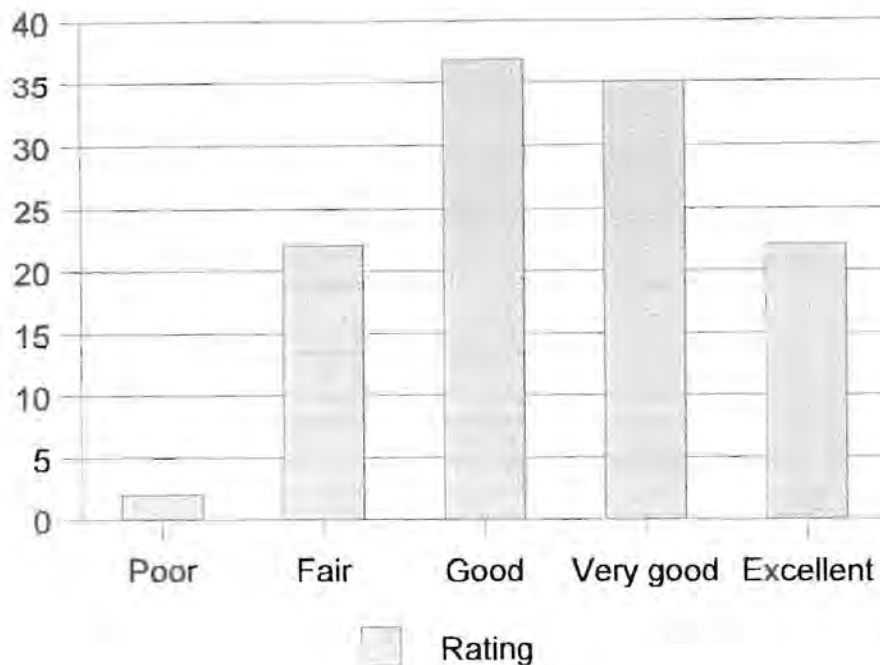


The respondents received education in various cataloguing procedures. Authority work is rated quite low, namely 55 (45.83%) probably because it is not easy to teach theoretically but mainly through training on the job. Coding of data was rated the lowest. As many cataloguers who completed the questionnaire were educated quite long ago these topics were not included in the curriculum at that time and are fairly recent developments

**5.3.3.3 Rate the knowledge of cataloguing you gained in your academic programme:**

(1 = Poor    2 = Fair    3 = Good    4 = Very good    5 = Excellent)

**Figure 17: Rating of the quality of education received**



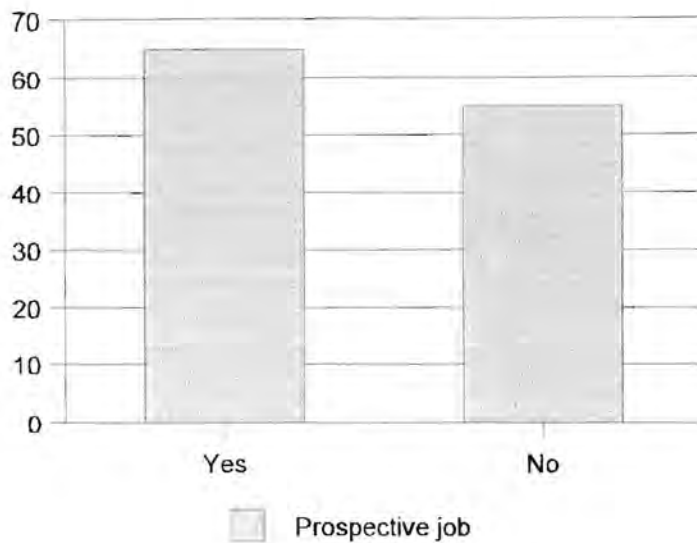
By far the most respondents regard their cataloguing training as good (37 (30.83%)) or very good (35 (29.17%)) even though it might have been long ago. 22 (18.33%) rated the knowledge gained to be fair and only 2 (1.67%) as poor. In the past much more time was devoted to cataloguing in the curriculum and lots of practical work was done. At present this is no longer so, at the majority of library schools.

Ratings could be inaccurate in some instances especially where education was received more than ten years ago and respondents could not remember clearly what they learnt.

(Foddy, 1993: 90). Perceptions on the quality of their education, especially regarding modern cataloguing practices, will be negative.

#### 5.3.3.4 *Did you perceive cataloguing as a prospective job?*

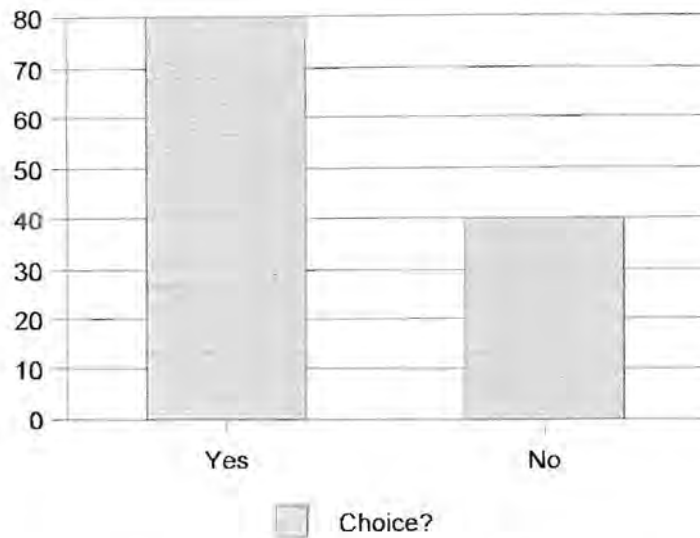
**Figure 18: Cataloguing as a prospective job**



Most of the respondents 65 (54.17%) declared that they like cataloguing. Most students probably do not perceive cataloguing as a prospective job after completion of their studies, but are appointed in cataloguing posts.

### 5.3.3.5 *Did you choose to become a cataloguer?*

**Figure 19: Choice to become a cataloguer**

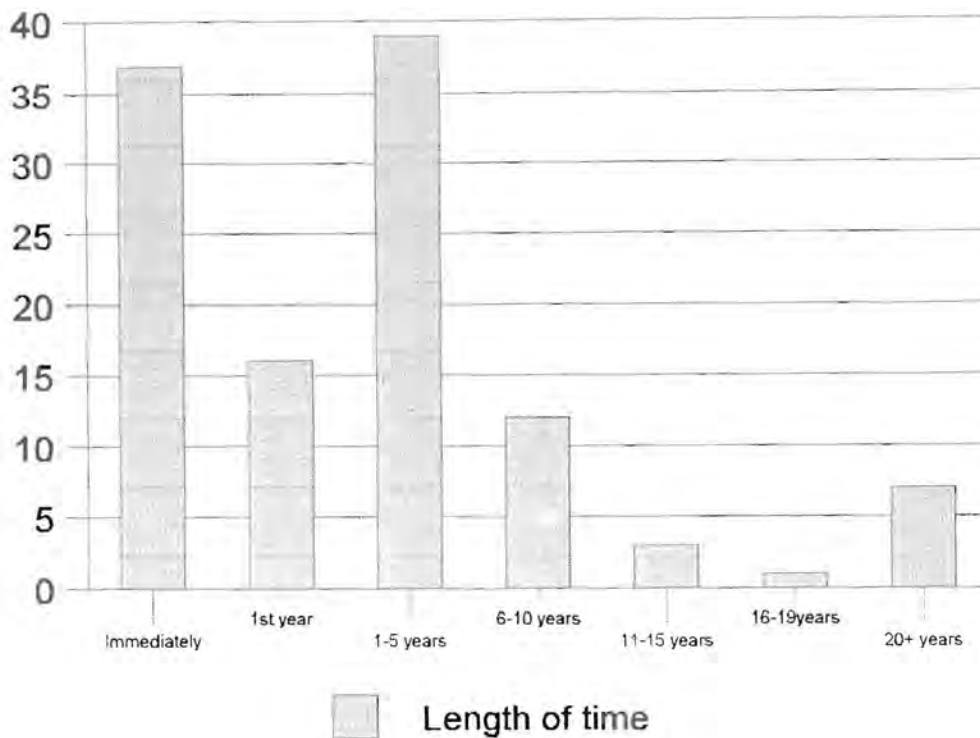


By far the most (80 (66.67%)) indicate that they chose to become cataloguers, according to the responses. About a third (40 (33.33%)) did not prefer cataloguing, but if read in conjunction with the previous question, learnt to like it. According to White (1987:48) relatively few students like cataloguing enough when they start working. Many are appointed in professional posts after completion of their studies and start of as cataloguers. Those who do not like it, make a change, while others who did not like it as part of their studies, learnt to like it in an actual work situation.



5.3.3.6 *How long after qualifying did you start to do cataloguing work ?*

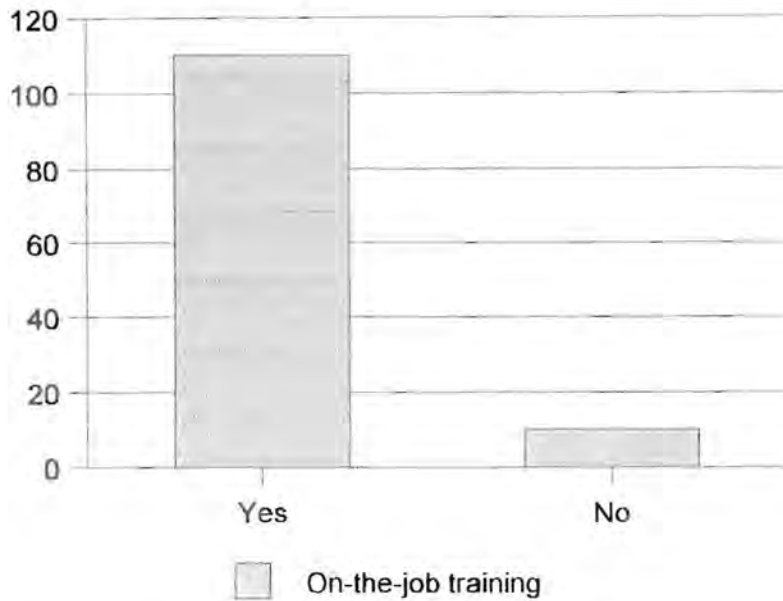
Figure 20: Length of time after qualifying



Quite a number started cataloguing immediately or soon after qualifying. Only 53 (44.17%) started cataloguing within the first year of working. It is amazing that so many started cataloguing after quite a number of years. It is a debatable point whether they still remembered much from their studies. These people would require even more in service training than the others.

5.3.3.7 *Did you receive any on-the-job training in your job when you were a first time cataloguer?*

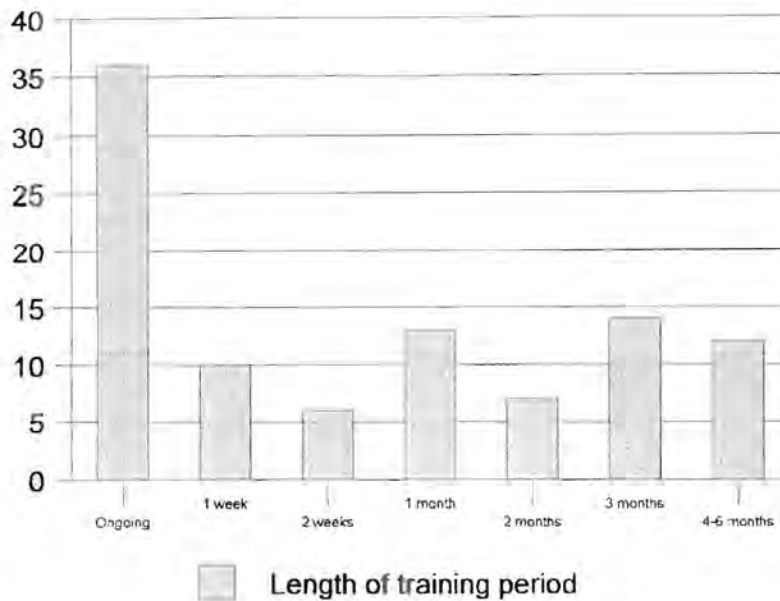
**Figure 21: On-the-job training received**



As institutions differ so much in their cataloguing procedures, it is taken for granted that all cataloguers should receive in service training. It is impossible for library schools to deliver students who know enough about cataloguing to start working on their own without on-the-job training. 10(8.33%) indicated that they received no initial on-the-job training.

If yes, what was the length of the training period ?

**Figure 22: Length of training period**



There is quite a difference in the length of time devoted to training. Only 14 (11.67%) indicated ongoing training. Those who indicated the period of training in years were also grouped under ongoing training, increasing the number to 36 (30%). 22 (18.33%) did not complete this part of the question, which might mean that they also received no training at all, or received it without recognizing it as such.

5.3.3.8 Which training methods were used during your training period?

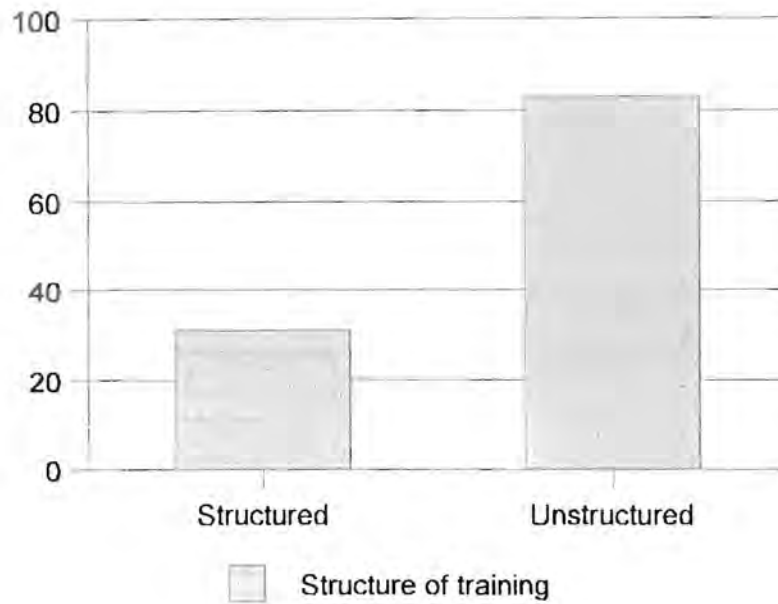
Figure 23: Training methods used



It seems as if working under supervision while cataloguing, after the initial in service training was completed, is regarded as the most useful method. Use of lectures and training manuals is less common.

5.3.3.9 *How was your cataloguing training programme structured ?*

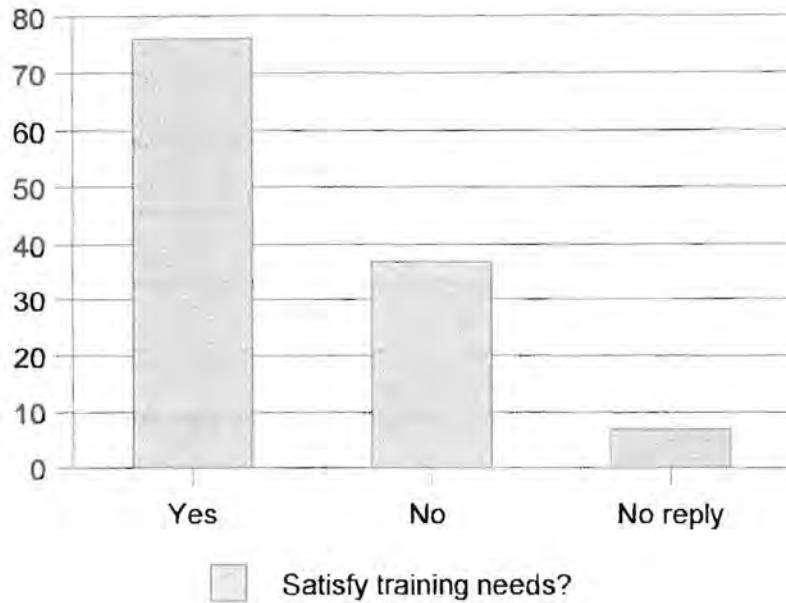
Figure 24: Structuring of training programme



In accordance with the previous question, it seems that unstructured training is most common (83 (69.17%)). Quite a percentage indicate structured training (31 25.83%), but there is no way to establish how this correlates with the way in which the training as indicated in the previous question was done.

5.3.3.10 *Did the training you receive on the job satisfy all your training needs ?*

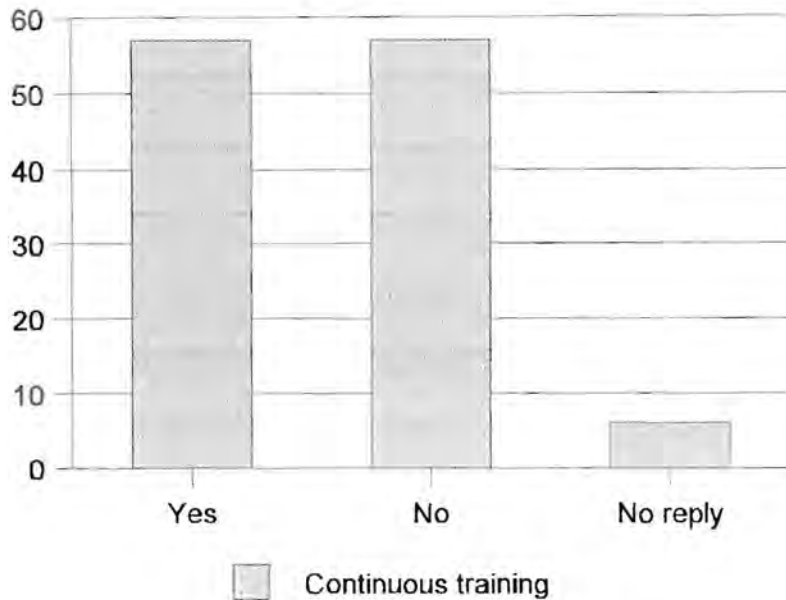
**Figure 25: Meeting of training needs**



Just more than half (76 (63.33%)) feel that their in service training was adequate. The rest (37 (30.83%)), was not satisfied and 7 (5.83%) did not answer the question. It is significant that so many respondents feel their training was not adequate.

5.3.3.11 *Is there any set programme of continuous on-the-job training in your library ?*

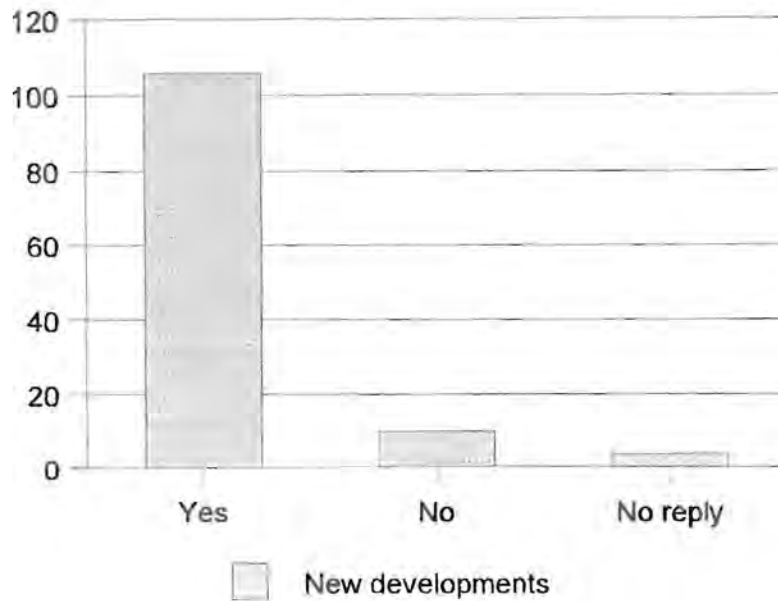
Figure 26: Continuous on-the job training



It seems that half of the institutions have a continuous in service training programme 57 (47.5%) replied yes and the same number replied no. It would have been useful to know for which areas of the work this was provided and how they feel about it. The difference between “ongoing” as used in question 21 is not clear, If “ongoing” and “continuous” is the same, more respondents received continuous training.

5.3.3.12 *Is there a way of keeping you informed about new developments in cataloguing and in library work in general? (Eg journal circulation, articles, workshops, meetings, discussions, etc. )*

Figure 27: Being kept informed of new developments

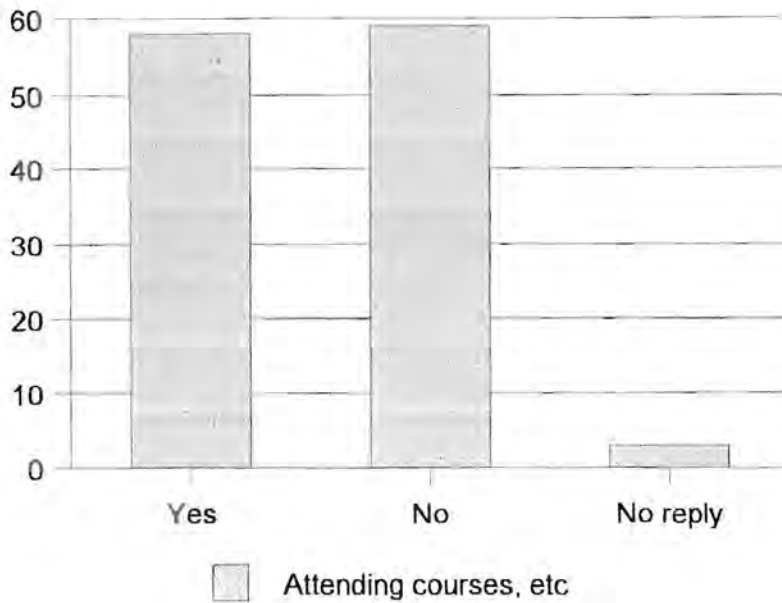


By far the most cataloguers (106 (88.33%)) are kept informed about new developments. It would have been interesting to know how this was achieved. Possible methods are mentioned, but it is not known which the best methods are. This would have been useful when making recommendations for better training methods. Junior staff members often do not get enough opportunities to attend meetings, etc.



5.3.3.13 *Are you aware of any cataloguing meetings seminars or conferences relevant to your work that you missed the opportunity to attend?*

Figure 28: Knowledge of meetings, etc.

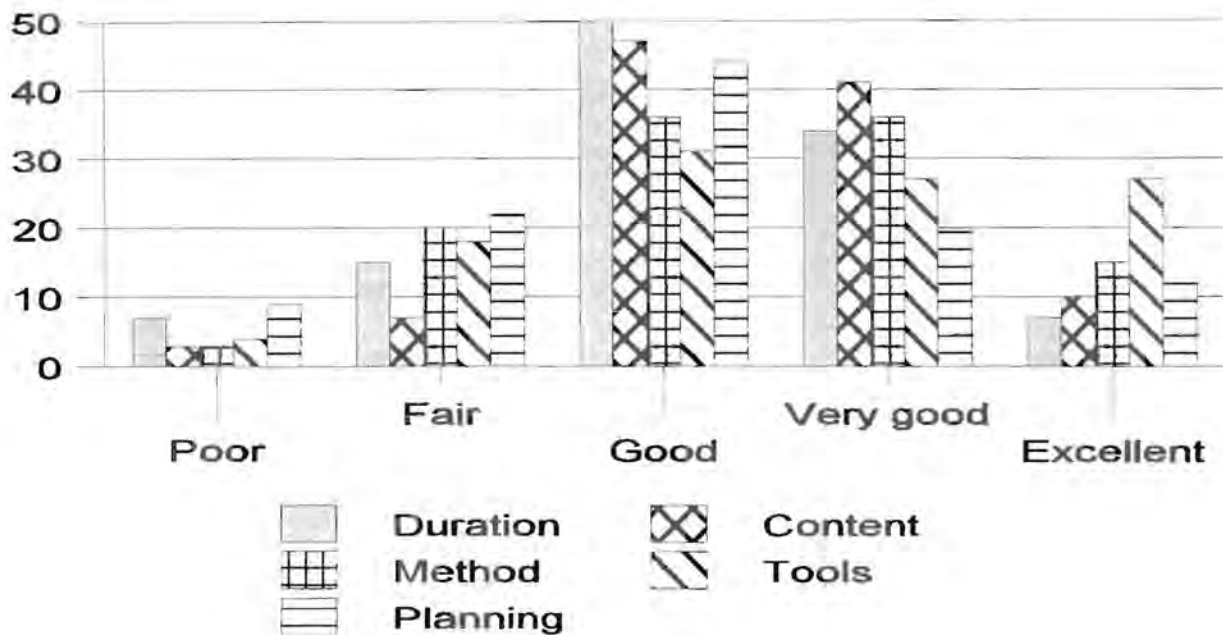


This only refers to opportunities missed and does not really correspond to replies to the previous question. 58 (48.33%) indicate that they knew of opportunities, but could not attend. It is not clear why they did not attend the courses etc. Staff is kept up to date, according to the previous question, but according to responses to this question 59 (49.17%) ,were not aware of opportunities missed. They were then not really kept up to date in all respects.

5.3.3.14 *Please rate your library training programme for cataloguing in terms of identified features:*

(1 = Poor 2 = Fair 3 = Good 4 = Very good 5 = Excellent)

Figure 29: Rating of training programme



The evaluation of training methods is perceived to be good and upwards in respect of all the factors named. Not many found it poor to fair. It seems as if planning of programmes is not satisfactory.

### 5.3.4 D : Questions on training needs

#### 5.3.4.1 *On which aspects of the work you are doing would you prefer to receive more intensive training?*

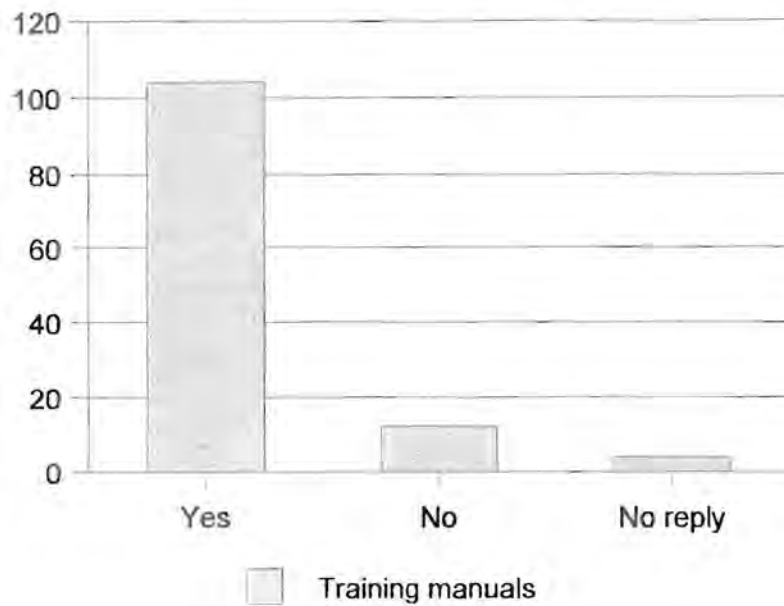
Figure 31: Aspects on which more training is needed



Questions 29 and 30 ask almost the same thing and can be combined when deductions are made. Almost the same information is required, but the percentages of the responses differ significantly, with subject cataloguing rated the highest priority, with coding (MARC21) and authority work second. The listing of specific areas probably made this question easier to answer than the previous one. It will have to suffice which areas need attention, without taking note of the relative percentages.

5.3.4.2 *Do you have any training manuals in your library ?*

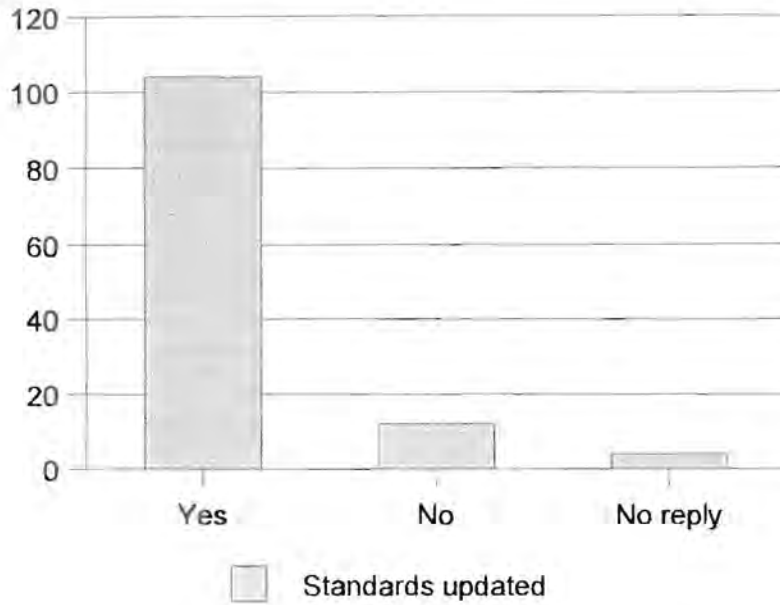
Figure 32: Availability of training manuals



Most respondents (104 (86.67%)) indicated that training manuals are available and 12 (10%) indicated that no manuals are available. Indication of which training manuals would have been useful. Just knowing that there are manuals, but not which does not help much when making recommendations. In question 22 only 60 marked the use of manuals as a training method, which is contradictory. It might mean that manual are present in the library, but they are not used in training specifically.

5.3.4.3 *Are cataloguing standards regularly updated in your library?*

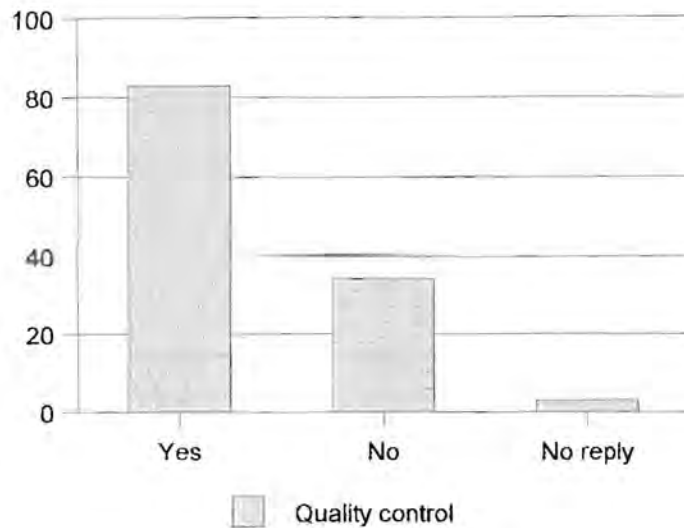
Figure 33: Updating of standards



Although 104 (86.67%) answered yes and 12 (10%) no, it would have been better to list possibilities and have respondents mark them. Just knowing that standards are updated, but not which standards is not very useful.

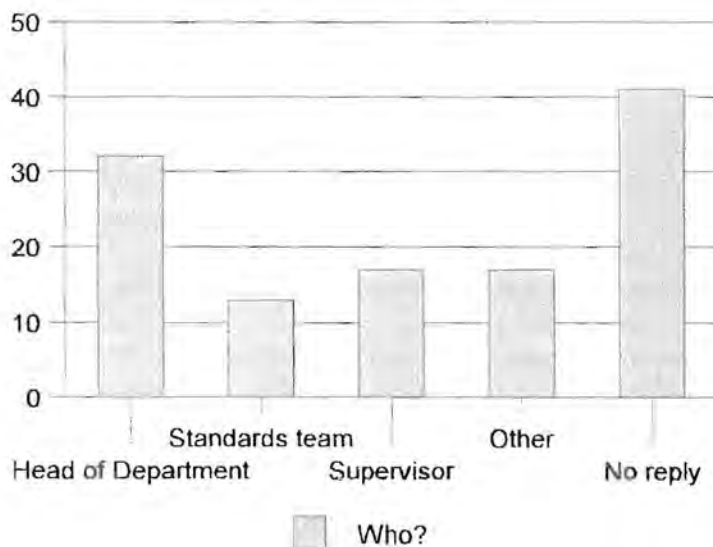
### 5.3.4.4 *Is the quality of your cataloguing evaluated ?*

**Figure 34: Evaluation of cataloguing**



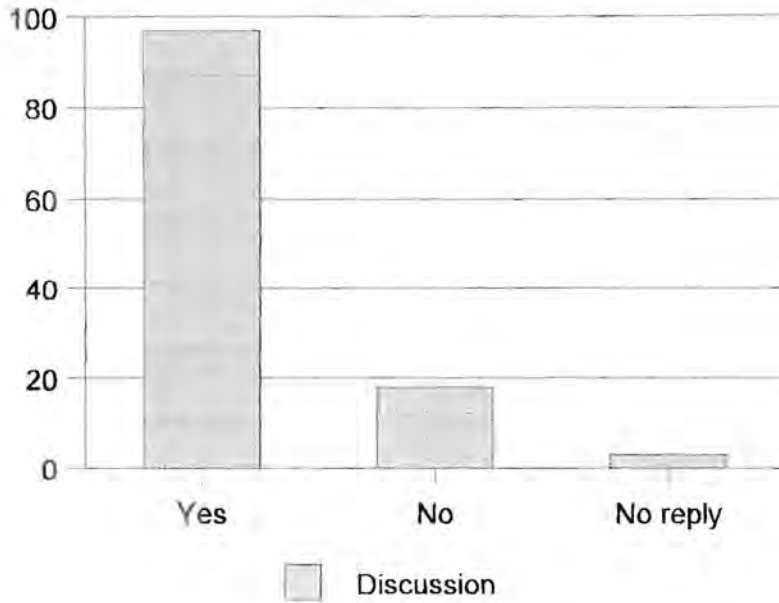
More than two thirds 83 (69.17%) indicate that quality is evaluated. Most respondents did not reply to this question, but in most cases it seems that the head of the department or the supervisor does the checking.

**Figure 35: By whom the evaluating is done**



5.3.4.5 *Is there a way of discussing your training needs with your supervisors or trainer on a regular basis*

Figure 36: Discussion of training needs



It seems as if most of the cataloguers (97 (80.83%)) can bring training needs to the attention of their supervisors, who should then take the responsibility of arranging for providing in these needs. 18 (15%) do not discuss training needs with their supervisors.

5.3.4.6 *Give additional comments on your present and future needs for improved training for your present position*

Figure 37: Additional comments



This open ended question was almost impossible to analyse. Only the items that were mentioned most were given here. The rest was incorporated with question 29. Most respondents felt that planning of training is essential. Specific areas of training needs were mentioned again, even though previous question also dealt with that. Some libraries feel isolated from training opportunities. One felt that retraining would be useful to bring cataloguers up to date with new developments. It is also evident that there is a need to share ideas on training of cataloguers.

5.4 Conclusion

Although there were a number of questions which could have been formulated better, Enough information was obtained from the survey, to get an idea of what cataloguers in South African university libraries actually do and what their training needs are. This can then form the basis for planning a training programme.



## Chapter 6 : Conclusions and recommendations

### 6.1 Introduction

The aim of the study was to establish the general status of cataloguing practice in university libraries, especially the training provided. It also attempts to ascertain if there is a need for improved training. A feasible training programme is suggested.

Five subproblems were identified, stating that cataloguers are probably not well trained for the challenges they meet in practice. The problems are:

- (a) How does a highly challenging and continuously changing professional environment challenge the expertise of cataloguers?.
- (b) How should cataloguers be trained to perform well in this changing environment?
- (c) What knowledge and what skills are needed?
- (d) How did cataloguers in academic libraries experience the education and training they received?
- (e) What are cataloguers' perceptions of their own training needs?

### 6.2 Conclusions

Several conclusions on the training of cataloguers can be reached based on the information from the literature study and the survey that was done. The literature study was helpful to establish the background information about the nature of cataloguing practice. The challenges of the profession are manifold and not known to others in the library profession. Challenges emerge from continuous changes in tasks and the role

played in information provision. The changes can be interpreted in both a negative and positive way.

### **6.2.1 Cataloguing practice in university libraries**

Cataloguing practice in university libraries is shaped by the environment in which it is performed. It has to keep pace with changes and resultant demands. Universities are characterised by continuous revision of their missions, visions, and strategies in order to offer education that is relevant to current market needs.

Cataloguing in university libraries is more demanding and sophisticated because of the size of the institutions and sophisticated user needs. Subject cataloguing is important in this environment to support specific subject oriented and research information needs. Traditional functions are changing at a faster pace because of advances in technology. Cataloguers have to deal with changing publication formats, new cataloguing tools and added responsibilities, brought about by networking.

### **6.2.2 Changing tasks and roles of cataloguers**

The number of professionals participating in cataloguing tasks are reduced with shared cataloguing and outsourcing of cataloguing functions. Tasks like copy cataloguing are increasing and are moved more towards nonprofessionals. A positive result of this is that a lot of routine tasks which traditionally formed part of cataloguing and contributed towards the low image of cataloguers, are no longer required of professionals. Tasks requiring their professional expertise are expected of them. The number of professional cataloguers will definitely be reduced. The managerial side of cataloguing will remain a professional task. Even in situations where total decentralization or outsourcing is current practice, it will still be necessary to have cataloguers who can coordinate and manage cataloguing affairs, especially in larger libraries like university libraries.

### 6.2.3 Knowledge and skills required

Entry level cataloguers are usually not ready for the job. There is not enough time to cover all aspects of knowledge and skills required in the current complicated and changing cataloguing environment (Coetzee, 1995:151). Research conducted recently in the USA by Romero (1994) indicated a high percentage of the cataloguing errors of beginning cataloguers. He concluded that there is a need for improvement in cataloguing courses, and training programmes to improve on the quality of cataloguing. Training on the job should involve some revision of basic cataloguing principles and procedures as less time is allocated to teaching cataloguing during professional education.

The introduction of new tasks and roles necessitates revision of knowledge and skills required by experienced staff. Improved training programme planning, focussed on the prevailing situation, is necessary. The needs for training are mainly related to technology. Training and retraining are becoming increasingly important to allow staff to operate effectively in the technology dominated environment Ford (1993: 27).

## 6.3 Survey findings

Various empirical studies related to the present research have been conducted in South Africa on subjects like university libraries, bibliographic control, cataloguing and classification; library and information science education, training and continuing education. This survey, described in previous chapters, provides the following information of cataloguing in South African university libraries.

### 6.3.1 Cataloguers' tasks

Cataloguers are experiencing changes in the tasks they have to perform. Cataloguing remains a professional job. The division into professional and nonprofessional tasks is being practised but confusion exists as to which tasks falls into each of these categories.

Most cataloguers perform tasks that fall into both categories. Most cataloguing, in South African university libraries, remains centralized, where cataloguers concentrate mainly on cataloguing duties. A few libraries practise decentralized cataloguing. Although some predict the diminishing of the status of cataloguers, this is not the case in South African university libraries.

### **6.3.2 Training of cataloguers**

The training of cataloguers in university libraries in South Africa is generally unstructured but considered generally satisfactory. A number of needs however remain which were not met during education, initial on-the-job training or ongoing training.

### **6.3.3 Training needs**

Training needs as perceived by cataloguing practitioners are varied but mostly relate to technology. Training which enables cataloguers to keep up with developments, appears to be the main concern. There is also a need also for training in the basics of cataloguing, which tends to be forgotten.

The assumption stated at the beginning of this study that cataloguers are probably not well trained, was confirmed, but not to the extent assumed. Only a small percentage of cataloguers were dissatisfied with the training they received. Change related training needs, e.g. need for training in MARC21 due to systems changes, are common. There is a clear indication of the necessity for improved training.

## **6.4 Recommendations**

The aspect of training covered in this study is not mainly about new ways of training, but aims at improvement of the performance of cataloguers. Improved performance will be reflected in improvement of their image as a result of the quality of the products they

create and the services they offer. Improved training is considered important for better performance.

#### **6.4.1 Education**

The importance of cataloguing education in library and information schools is confirmed. More time and an improved attitude by educators and students are necessary. More practical experience should be introduced in the teaching of cataloguing. There should be improved cooperation between cataloguing educators and practitioners to improve integration of theory and practice. A two-way interaction where practitioners, in actual work situations participate in offering practical education, is recommended for producing marketable graduates.

#### **6.4.2 Training programmes**

Training programmes in libraries should be improved and should be more structured. This will improve on commitment and accountability to training. Training of individuals and groups, has to be well planned and directed. Policies about human resources training and development should be present, well publicised, and enforceable.

Training should be based on existing general principles and training techniques to make training professional and successful. Training is a system and a positive environment should be created from the planning stage for the actual process and attainment of results. The university management, which forms the immediate external environment of the system, should continuously be made aware of the training needs of library staff. Enough money should be allocated in the budget for training.

Adult learning principles should be applied to learning which takes place during training. The research shows that cataloguers are not always involved in their training. Some of them do not have an opportunity to discuss their needs with their superiors. Cataloguers

should be involved at all levels of training, from planning to the actualization stage, in order to remain positive towards all training endeavours.

### **6.4.3 Steps in the training process**

#### **6.4.3.1 *Training needs***

An audit of cataloguers needs should be made from time to time. At least twice a year would be a good idea, because continuous developments and changes are a reality cataloguers face in their work. Needs for retraining in the basics of cataloguing should never be underestimated.

#### **6.4.3.2 *Contents of training programmes***

The changing role and status of cataloguers is a concern. The tasks cataloguers perform also continuously change, bringing new knowledge and skills requirements. It is important for cataloguers to research and redefine their training in line with new developments. New formats (e.g. multimedia) present new challenges and need for more knowledge. There should be retraining or revision in the basics of cataloguing and application of standards to unfamiliar formats.

Training will reduce the existing need for quality control. Maintenance of authority files will be made easier. Cataloguers will work more independently and learn to use initiative within the rules and principles of cataloguing. Lack of trust in the work done by cataloguers at lower levels and among institutions will decrease with improved training, especially cooperative training in a cooperative environment.

Available technology should be used maximally to do more copy cataloguing rather than duplicating work. Importation of records from OCLC is also expected to improve on this situation as most records were still missing from the SACat. More copy cataloguing should

be the responsibility of nonprofessional staff. Professional expertise can then be dedicated to tasks requiring expertise. Training in all basic knowledge and skills should still be maintained as much original record creation is still done locally.

Technology related training should be prioritised and continuous in relation to developments. Raseroka (1992: 15) says “Human resource training, beyond basic operation of available software, to a level of understanding which facilitates exploitation of different software packages for competitive advantage is essential”. This suggests the need for intensive training in the use of technology and related resources to maximise performance.

#### **6.4.3.3      *Training methods***

Methods of training also need to be improved on. Cataloguing with error correction, a procedure indicated by the results of the survey, to still be prevalent, cannot guarantee that all problematic areas are covered. Experience has shown that it is difficult to know when to stop error checking. It is however a useful method as actual cataloguing is needed for adequate training. Its usefulness can be improved on. After revision of work, a group session can be held to go over errors and omissions as suggested by Carter (1987: 86).

Well written procedure manuals are recommended for use as training resources. Osmus & Boydson (1987: 103) regard them as important to encourage new employees to be independent and try to solve their own problems. Problems and solutions should be discussed and formalized to form training manuals. Some problems are not encountered often and it is easy to forget how they were solved on a previous occasion. Manuals can be very helpful for revision.

Revision sessions are important in a cataloguing environment, as unfamiliar problems are often encountered. Problems should be shared and if a need for revision in principles is found to be necessary, training should be provided.

Other courses usually offered by universities, such as management or supervisory skills and evaluation of performance are also necessary for the management of cataloguing processes. Time should be made available for attendance of such courses. It should be a policy that knowledge gained should be shared with those who could not attend.

Attendance of training courses related to specific tasks should be encouraged. Different courses should be developed for all staff levels. More advanced modules should build on the foundation laid in earlier modules. Having people of different levels of understanding in one course can be intimidating and is not conducive to optimal learning.

Involvement of staff at all levels in projects and task forces, as suggested by Blanksby (1988: 22), is recommended as an important method to help staff gain experience of planning and implementation.

Nothing can replace the importance of self study as a way of developing staff on all levels. An environment suitable for self study should be created and resources (e.g. facilities and finances) made available for that purpose. Staff should be motivated to study to prepare them for future role changes and positions with increased responsibilities.

#### **6.4.3.4**      *Scheduling*

It is usually difficult to find enough time and staff available for training. Cataloguing workloads are usually heavy and pressure from library managers and users are exerted on cataloguers to have materials speedily processed. This study has indicated that staff sometime even lack time to read through their working tools. It is imperative that provision is made for training time. Cataloguing is not about quantity but about quality.



Bulk production of useless records is a waste of resources. Training should be continuous, so careful scheduling of staff and training periods should be done in advance.

#### **6.4.3.5      *Instructors***

All people involved in training should be given the status of trainers as suggested by Conroy (1986: 46). Time should be allocated in their daily activities for training. Careful balancing of their workloads and training activities should be made. Trainers should engage in continuous needs analysis and update themselves on new training techniques.

#### **6.4.3.6      *Evaluation***

It is difficult to evaluate an unstructured programme conducted on a trial and error basis. Most of the programmes in university libraries are unstructured and possibly most are not evaluated. Evaluation allows feedback on the training effort and improvement where necessary. It also serves as a way of assessing the existence of more needs as indicated by the trainees. Evaluation concludes the steps of training and is a step towards retraining or beginning of a new training cycle. The use of formally designed training evaluation forms is recommended as they can be a common and reliable measure of training success. The forms can be reviewed and reformulated whenever change is necessary.

#### **6.4.4    *Cooperative training***

Concerted effort to train, especially in a cooperative environment, is important. If the cataloguing of all libraries is not acceptable, it becomes even more important to provide same training to all members belonging to cooperatives. It is not cost effective to have some libraries continuing to add records of an unacceptable standard, thereby continuously corrupting cooperative catalogues. Sharing of specialist staff, facilities and other training resources in a cooperative is essential, to help all staff from participating libraries to acquire the necessary expertise

## 6.5 Suggested research fields

Cataloguers should engage in more research in their field in order to gain increased knowledge and also to contribute to the growth of knowledge itself. The generated knowledge will be helpful for determining the future of the cataloguing profession. A number of further field of studies are suggested.

- (a) Research on the effect of job restructuring on cataloguers in South African university libraries is very necessary. The effects of these changes are likely to bring great changes to cataloguing operations.
- (b) It will be interesting to determine if the number of professionals, qualified staff involved in cataloguing has decreased or increased in the last five years.
- (c) Research should also be done to establish if the stability in cataloguing jobs revealed in this survey is a result of job satisfaction or immobility.
- (d) There is absolute necessity to research what effect the joining of consortia has had on cataloguing practise in South Africa.