THE TRAINING OF CATALOGUERS IN UNIVERSITY LIBRARIES IN SOUTH AFRICA

by

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SUMMARY

Academic libraries play an important role in the teaching and research activities of an university. Cataloguers are usually responsible for organizing information and making it available to users. The environment in which cataloguers have to work, have changed significantly in the last number of years. The changes are, among others, due to the influence of technology, the increase in the amount of information available, the emergence of new formats and the increased availability of electronic resources. Cataloguing tasks have also changed from the traditional bibliographic description and allocating access points, subject cataloguing, MARC coding and authority work. Membership of bibliographic networks an consortia has a meaningful impact on what cataloguers do. Cataloguers have been de-professionalized to a large extent. Cataloguing activities are often decentralized and even outsourced. This study looks at the position of cataloguers at university libraries, establishing if they are well equipped for their task.

From a study of the literature, it has also become clear that the education of cataloguers, in South Africa as well as in the United States and the United Kingdom, does not prepare students adequately to do cataloguing effectively in the workplace. In this study, an attempt is made to establish which tasks cataloguers in South African University libraries are currently performing and what their training needs are. Recommendations of a feasible training model to improve cataloguer training in South African university libraries is made. The recommendations are based on a study of available literature, as well as a questionnaire survey done among 120 cataloguers in South African University libraries.

Staff training is an important process in the improvement of job performance and organizations are increasingly becoming aware of the importance of training to develop their most important asset , namely is human resources. Training however has to meet both organizational and individual development goals. Libraries have always practised staff training but the status of training provided needs to be continuously evaluated to

remain relevant and meet existing needs. The present training of cataloguers needs to be improved on to match the challenges brought about by recent trends in this field.

Index terms

academic libraries

authority control

bibliographic description

cataloguing in university libraries

cataloguing

cataloguing tasks

continuous education

copy cataloguing

education of cataloguers

MARC21 coding

Nonprofessional cataloguing tasks

on-the-job training

original cataloguing

professional cataloguing tasks

subject cataloguing

training of cataloguers

Opsomming

Akademiese biblioteke speel 'n belangrike rol in die onderrig- en navorsingsaktiwiteite van universiteite. Katalogiseerders is ook verantwoordelik vir die organisering van inligting en beskikbaarstelling daarvan aan gebruikers. Die omgewing waarin katalogiseerders moet werk, het egter beduidend verander in die laaste aantal jare. Hierdie veranderings is te weegebring deur onder meer, die invloed van tegnologie, die toename in beskikbare inligting, die onstaan van nuwe formate en die toename in elektroniese bronne. Katalogiseringstake het ook verander van die tradisionele bibliografiese beskrywing, toekenning van soekpunte en onderwerpshoofde, MARC-kodering en gesagswerk en sluit ook nou ander vaardighede in. Lidmaatskap van bibliografiese netwerke en konsortia het ook 'n beduidende invloed op wat katalogiseerders doen. Katalogiseerders word bowendien toenemend gedeprofessionaliseer. Katalogiserinsaktiwiteite word dikwels gedesentraliseer en selfs uitgekontrakteer. Hierdie studie kyk na die posisie van katalogiseerders in universiteitsbiblioteke en poog omvas te stel of hulle behoorlik toegerus is vir hulle taak.

'n Studie van die literatuur het aan die lig gebring dat die onderrig van katalogiseerders in Suid-Afrika, sowel as in die Verenigde State en die Verenigde Koninkryk, studente nie goed voorberei om goeie katalogiseerders te wees in die praktyk nie. In hierdie studie word gepoog om vas te stel watter take katalogiseerders in Suid-Afrikaanse universiteitsbiblioteke tans verrig en wat hulle opleidingbehoeftes is. Aanbevelings word gemaak vir 'n opleidingsmodel om opleiding van katalogiseerders te verbeter. Die aanbevelings is gegrond op die literatuur, sowel as 'n vraelys wat deur 120 katalogiseerders werksaam in universiteitsbiblioteke, voltooi is.

Opleiding van personeel is belangrik om werkverrigting te verbeter. Biblioteke doen ook o;leiding, maar dit moet voortdurend aangepas word om tred te hou met verandering.

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

Chapter 1: Introduction

1.1 Introduction

Organizations undergo continuous changes in order to remain effective. Different work situations are as a result getting more complex as they adapt to the changes (Collins, 1993: 60). Organizations are increasingly dependent on their employees to cope with change and employees are faced with the challenge to continuously develop themselves in order to perform competently in their work (Jurow, 1992 : 6). Employees are regarded as the key factor in helping organizations to adapt to environmental changes (Harvey & Bowin, 1996 : 4).

Libraries are currently experiencing problems like the extensive use of technology, reduction in funding, continuous explosion of information, and continuous rising costs in library materials (Jurow, 1992: 6). This often means that organizations must continue operating effectively with minimal staff and employees have to improve or acquire new technology-related knowledge and skills. There is also rising competition with other service providers like the Internet and outsourcing firms (Lor, 1996: 12). Libraries depend on the competency of their staff to satisfy user needs (Hart, 1997: 176). This important resource needs adequate training and development to help in the maintenance of operational effectiveness.

Cataloguing is a function in library operation that is characterised by the changes mentioned above. Bigger libraries like academic libraries have been the most affected by these changes. Cataloguing practice has had to continuously change over time to meet current library goals. The need for training and development of cataloguers is of high priority and has to be continuous. Properly structured training programmes should be put in place to satisfy properly the knowledge and skills needs of this group (Castelyn & Webb, 1993: 134).

1.2 Background to the problem

The problem of training as discussed in this study has its background in the practice of human resource training and development in organizations, specifically academic libraries. Training is an aspect of human resource management practice.

1.2.1 The importance of human resource management

Jurow (1992: 5) defines human resource management as "that area of organizational life that focuses on the effective management and utilization of people". Training and development of staff forms part of the management of human resources.

Staff training is a human resource management concept clouded by many and sometimes conflicting views, philosophies and interpretations. Different environmental factors (e.g. political, social, economical and technological) form the background within which the management of human resources is understood and practised. They also determine the effectiveness of an organization's training and development practice and policies (Mabey, 1995: 133). The continuous changes and developments in the workplace and its environment give rise to new needs and necessitate redefinition and redesign of training to meet the new and future challenges.

The need for training and development of staff remains for the duration of the employment at all workers at various levels in different organizations, and changes in the workplace necessitates their continuity. Training is an effort which can bring a partial solution to the problems of human resource management. It can help overcome any core competencies and deficiencies lacked by staff (Stafford & Serban, 1990: 93). New competencies can also be introduced through training whenever change causes the need for such in the workplace.

Literature indicates that South Africa faces a great challenge in managing human resources effectively and investing in their training and development (Gerber, 1987: 1). There is still a great shortage of highly skilled workers in various fields of work. Minister Mboweni, in his speech at the launch of the green paper on skills development on the 24th of March 1997, indicated the urgent need to address the general skills problems in South Africa. The library and information field is no exception to this need. More is increasingly being expected from the human resources in this field to satisfy a growing need for information and to ensure the success of libraries and information provision services.

The changing human resource management attitude in our country is clearly described by Jurow (1992: 5) as that of a shift of emphasis from control to development of workers. This means that more value is attached to the contribution that individuals make to the success of their organizations. People therefore have to be adequately equipped with the knowledge and skills necessary to perform their duties expertly and for the purpose of self development. Development of human resources is currently receiving emphasis in all organizations (Lombard, 1997: 15). Training and development of staff is of great importance as a source of motivation, which has a positive impact on performance.

1.2.2   Training of library staff

This study is done at a time when there is a general awakening in our country, as it is throughout the world, towards the need for a highly knowledgeable and skilled workforce. Library and information work with its service orientation depends on the people who are the service providers to satisfy the needs of their users (Creth, 1986: 2 & Jurow: 1992: 6). It is also faced with the challenge of developing these people into a competent workforce. Training, as noted by Stafford & Serban (1990: 93), can be a step in that direction because it is meant to promote competency. Staff development and training are key tools in maintaining the operational effectiveness of the human resource (Hart, 1997 : 177).

Libraries are constantly changing and personnel working in them must adapt to keep pace (Baldwin, Gibbs & Slough, 1997: 267). Technology is one of the major forces that has changed and complicated library work and created a greater need for improved and continuous training. The need for skills development in this environment is thus indispensable.

There are constant attacks from within and outside the library and information profession on the competence of librarians and the failure of different types of libraries and their services everywhere in the world to satisfy user information needs. Waite (1995: 36) criticizes technical services in libraries for not meeting the information expectations of library clients. University libraries are also faced with these criticisms mostly from their immediate external environment, i.e. the communities they serve. The satisfaction of the user is a very important element that determines the continuous existence of the library and its services, as well as affecting resource allocation (Creth, 1986: 2).

University libraries are striving in spite of dwindling resources to satisfy the needs of these communities. Cuts are experienced in budgets and staff while the demand for improved and more varied service is increasing (Steinhagen & Moynahan, 1998: 16). All functions of the library are complementary towards satisfaction of user needs and competent library staff can be a great asset in addressing the issue of service quality to users in this time of difficulty.

Libraries should increasingly invest in the training and development of their staff so that available human resources can be maximally utilized to achieve organizational goals. Unrealistic expectations are not placed on the management of libraries to create talent where it does not exist in individual staff workers. Lunn (1992: 154) sees their responsibility as that of refining and directing the talent through training. Training is an indispensable aspect of effective human resource management. Management's commitment to invest in training is very important for successful training to take place

(Jurow, 1992: 16). This should be reflected in policy and resource allocation (staff, money and time).

1.2.3   Training of cataloguers

South African human resources management literature covers the aspect of training extensively. There is also significant work that has been published on the training of librarians for various types of library and information work in the country. South African national bibliographic databases however, display very few works specifically on the training of cataloguers in this country. The United States and the United Kingdom can be considered from available information to be examples of countries that have published extensively on the training they conduct for cataloguers yet they still express the need for more formalized training programmes. One of the recent recommendations to assist in the training of beginning professional cataloguers has been made from the research by Romero (1994: 224-226) and the Committee on Education, Training and Recruitment of Cataloguers (1994: 32-34) of the Association of Library Collections and Technical Services. This is a visible and continuous effort to contribute to and improve on the training of cataloguers.

Cataloguing practitioners in South Africa and throughout the world generally agree on the prevalence of poor performance amongst cataloguers. This is evident from library professional literature and in the discussions in cataloguers' meetings, workshops and conferences. The Seminar on Bibliographic Standards for Promotion of Cooperation held at the University of Pretoria in 1996 exposed the general failure of cataloguers in our country to adhere to nationally acceptable cataloguing standards. The raising of complaints about the quality of cataloguers' work is evidence of the need for improvement. This meeting indicated the seriousness and urgency of the need for improved knowledge and skills amongst cataloguers presently. One of the final recommendations from the papers and the panel discussion was that cataloguers should be adequately trained (Coetzee, 1995: 154).

University libraries are faced with the responsibility of providing their cataloguers with the opportunity and support required to acquire and develop further knowledge and skills. South African university libraries have to improve on the knowledge, skills and attitudes of their staff through on-the-job training for the present tasks and continuous education for the future.

Cataloguers, both new and experienced, are also confronted with a situation in which they have to develop continuously their knowledge and learn new skills in order to cope with the continuous developments affecting their job. This suggests the necessity to revisit the present approaches to training (Intner & Hill, 1986: 44). Failure to keep abreast of developments is a recipe for disaster for the future of cataloguers. Coetzee (1995: 150) regards inadequate on-the-job training and lack of continuous training by the library employing the cataloguer as one of the reasons leading to poor cataloguing work.

1.2.4 Current trends in cataloguing practice

The recent trends in cataloguing worldwide are characterised by continuous change and developments. The literature shows that leading countries like the United States and United Kingdom indicate significant changes and expansion in the roles of cataloguers. South African libraries have started to experience this impact. The changes are the result of the influences of technology, deprofessionalization of cataloguers, cooperative efforts, decentralization, and outsourcing.

1.2.4.1 *Influence of technology*

Technology has been the main force behind the changes in the nature and practice of all library functions including cataloguing (Hill: 1997: 15). The introduction of technology into traditional cataloguing practice brought changes that were welcomed with appreciation since it simplified tedious repetitive manual work like the typing of catalogue cards. Network communication has brought an even greater revolution by allowing the

sharing of cataloguing work (Collins, 1993: 69 & Van der Walt, 1997: 87). Access to various online cataloguing tools is also made possible. SACAT on SABINET has been such a relief to use amongst cataloguers and more value is added by the subscription to OCLC from where most records can be imported. The duplication of cataloguing functions is expected to decrease and thus make items available to users in much less time than before.

Cataloguing tasks have become more sophisticated as cataloguers have to keep up with changing technologies and cataloguing systems (Hudson, 1987: 77). This will be discussed in detail later in the chapter discussing cataloguing tasks. These developments and changes also have an impact on the way cataloguers are educated and trained. Changes in cataloguing, according to Carter (1987: 89) & Hudson (1987: 77), make the need for additional training essential.

1.2.4.2   *De-professionalization of cataloguers*

In the literature, contrasting views are held on the future of cataloguing and cataloguers. Holley (1981: 90) predicts the gradual demise of cataloguing and cataloguers whilst opposite views, like Gorman (1995: 33) and Buttlar & Garcha (1998: 322), profess the continued existence of cataloguing with expanded roles for cataloguers. The value of cataloguing in university libraries is still acknowledged and cataloguers will still be needed now and in the immediate future (Benaud, 1998: 83 and El-Sherbini & Klim: 1997: 32). Literature (e.g. Benaud, 1998: 83) indicates that the same situation exists even in countries that are far ahead in their overall development like the United States.

One of the changes shaping the cataloguing profession and impacting on cataloguing practices is de-professionalization. Trainer (1989: 3) states, "Cataloguing is being turned into an activity for nonprofessionals". The debate centres around the shifting of cataloguing duties to nonprofessional staff. The reality of the shift in this direction cannot be ignored by cataloguers. Some of the changes are also very sudden, and preparations

for the transition should be taken seriously. Professionals will not be completely stripped off cataloguing responsibilities but are becoming more of cataloguing managers (Trainer, 1989: 369 and Mohr & Schuneman, 1997: 214). Brindley (1988 :3&4) and Trainer (1989: 369) asserts that there will be a reduction in numbers of professional full time cataloguers and what remains of professional cataloguing responsibilities will be of higher level order and should be used to enhance the position of cataloguers. Strong characteristics that are required of professional cataloguers in the new tasks they will be expected to perform need to be identified and developed.

De-professionalization is brought about by the increased use of technology in cataloguing work (Dockel, 1992: 83). Copy cataloguing is used much more than original cataloguing. This signifies the beginning of deprofessionalization of cataloguing practice (Jeng,1997: 121). In copy cataloguing, items are catalogued by adapting or copying cataloguing records which have been prepared by other cataloguers (Hudson, 1987: 70). Professionals concentrate on original cataloguing where cataloguing of a new item is done from scratch. In some libraries, paraprofessionals are also entrusted with the responsibility of original cataloguing (Lor, 1996: 12).

Many university libraries in South Africa still have to perform a significant amount of original cataloguing. There are still many information sources without existing records in commonly used bibliographic databases like SABINET. Locally created sources such as theses and dissertations will also remain the responsibility of local university cataloguers. The use of copy cataloguing has caused a decrease in the amount of original cataloguing to be done. Access to the OCLC cataloguing services through SABINET has brought about a great reduction in original cataloguing. The increased use of copy cataloguing will depend on continuation and the quality of original cataloguing records (Hill, 1988: 96). More responsibility is placed on original cataloguers. In South African university libraries, these are mostly professional people. According to Hill (1988: 95) "what has changed is not the professional nature of original cataloguing but the amount".

Nonprofessional staff should be supervised by professionals who know what is needed (Intner & Hill, 1989: 5). Professionals will therefore still be playing a vital role in cataloguing practice. The education and training of cataloguers is still of critical importance because they will still be expected to carry out those tasks demanding their qualifications and competency to perform (Coetzee, 1995: 150). Arguments continue about the probability of a total shift of cataloguing to nonprofessionals.

Cataloguers will be required to improve their competitiveness and get ready to remain functional in whatever new tasks they may be required to perform in this technological era (Trainer, 1989: 366). Proper training will assist the cataloguers to find ways of redefining their position in libraries - in existing tasks or new ones - and to remain in control of their environment as long as they remain in their practice. It will also keep them informed and able to participate in shaping their future.

The possible decrease in the number of professional cataloguers should not bring about a compromise in the standard of cataloguing. The situation in South African university libraries is that professional librarians still do most of the cataloguing work. This practice will remain in force in the foreseeable future. Libraries operate in different ways, such as forming decentralized service units. More professionals from outside the cataloguing pool are drawn into cataloguing in this way. It is not clear if these cataloguers are automatically ready for cataloguing jobs. Training remains relevant in this era for cataloguers to remain efficient in their present work.

1.2.4.3 *Decentralization*

The environment of university libraries continues to change and this sometimes necessitates adjustment of the organizational structures to improve efficiency (Ford, 1993: 26). Some university libraries in South Africa are moving from centralized to decentralized cataloguing. Technology has made it possible for cataloguing to be performed from different workstations in the library and even from outside the library

(Evans & Heft, 1994: 11). In this latter setting, cataloguing duties are assigned to people who have traditionally not been a part of the cataloguing workforce such as people in the service areas. Some of these staff members have little or no experience in cataloguing. Coupled to this is the lack of interest in cataloguing by some librarians. On-the-job training becomes more imperative. Many people drawn into cataloguing have to be trained to do work they have not done before, even if it was part of their original education.

Cataloguers themselves are faced with a new challenge in the decentralised environment. They have to learn new tasks like reference techniques, where their knowledge of bibliographic record structures and search techniques gives them an advantaged (Gorman, 1995: 33 and Steinhagen & Moynahan, 1998 :15). Cataloguers benefit from this because they can expand their expertise. It may not be easy for cataloguers to accept this change, but flexibility will enrich their role as they can now practice more professional skills (Brindley, 1988: 5). Decentralization is also a good prospect for cataloguers in cases where subject specialization is practised. They can improve their subject knowledge and offer improved service in their fields.

Another structural change resulting from decentralization is that of working teams, where the members of the team are becoming multi-skilled to share library functions according to various subject specialization (Eskoz, 1990: 384). Findings by Evans & Heft (1994: 11) confirm the view by Lundy in the late 1950's on multiskilling, i.e. that a librarian should be responsible for a subject area and have the responsibility to identify, select, order and catalogue the material for the collection as well as offer reference services. As pointed out by Eskoz (1990: 385), experimentation with new structures still continues.

Decentralization can eliminate the barriers between different operating units in the library, coupled with the advantage of enriching jobs (Evans & Heft ,1994: 11). Existing training programmes have to be made more relevant to cater for the transition. Training must transcend the traditional boundaries of cataloguing to remain relevant. These issues

should be considered so that correct approaches can be used to on-the-job training for cataloguers in university libraries. Cataloguing has to continue to be performed well, regardless of the structure of management within an institution.

1.2.4.4 *Cooperative efforts*

The trend of libraries forming co-operatives and consortia has recently become common in South Africa (Van der Walt, 1997: 87). Increase in shared cataloguing on SABINET has revealed the seriousness of the need to catalogue according to commonly accepted standards. In the formation of consortia of university and other library types it is envisaged that cataloguing will be shared optimally. Cataloguers are no longer cataloguing only for their local library, but for all other members of the consortium (Intner & Hill, 1989: 94). The need for records of good quality is accepted by all cataloguers. Cooperative programmes use training as one of the attempts to control quality of contributions by members (Bowen, 1998: 75). Cataloguers, as the creators of bibliographic data, bear the responsibility for correctness and usability. University libraries contribute significantly to these shared efforts. The need for improvement in the quality of records contributed to shared bibliographic sources has become clear. Many complaints and concerns have been expressed in this regard. There is a need for increased efforts to solve this problem. The need to improve the usefulness of local, regional, national and international catalogues cannot be overemphasised.

1.2.4.5 *Outsourcing of cataloguing*

Gorman (1995: 33) defines outsourcing as the "turning over the responsibility of cataloguing current acquisitions to commercial firms". In the political realm it is known as "privatization". The aim of this option is to enhance productivity. Outsourcing is not yet a common practice in South African university libraries but its possibility has an effect on the future image of cataloguing. It can influence the attitude of cataloguers towards their work if they are not kept informed of developments. The training of cataloguers should

take this into consideration to improve the competency of present cataloguing practitioners in this competitive environment.

Libraries have to weigh the costs of outsourcing against the costs of their present operations and other possible alternatives. Outsourcing can lead to the closing down of cataloguing departments. Some libraries like the Loyola State University of Chicago outsourced only part of their collection and this works well for them (Waite, 1995: 36). Holt (1995: 34) indicates that if outsourced cataloguing is selected, the process still has to be managed, and cataloguers will be responsible for this management.

All the above-mentioned changes will affect university libraries at different levels, depending on the pace at which they keep up with change and development, especially in the field of technology. Programmes for training may need adaptations from library to library to suit their unique circumstances. The principles of training however will remain basically the same. The approach to training chosen should enable staff to acquire the required skills and knowledge in an efficient and effective manner (Creth, 1986: v).

1.3   Definition of terms

1.3.1   Cataloguing

Cataloguing is the art of describing and listing material to make it as easy as possible to discover the nature and extent of what is available and, if appropriate, where this material may be located or obtained (Hunter & Bakewell, 1991: 2). The term includes subject cataloguing, which consists of classification and the allocation of subject headings.

1.3.2   Cataloguers

Cataloguers are to professionally qualified librarians, whose duties include cataloguing of various forms of library materials. Nonprofessional staff members are already involved in

cataloguing in some South African university libraries but the training they require will be different, due to their lack of professional library education. The nonprofessional staff can be distinguished into two, paraprofessionals with a library lower diploma or a technical qualification in library and information science and clerical and administrative staff with a senior certificate (Kerkham, 1988:7). The latter staff level might also have other skills like computer literacy.

The trend towards decentralizing cataloguing means that cataloguing now involves other staff members not traditionally involved in cataloguing. The term cataloguer will therefore refer to all librarians who do cataloguing regardless of the organizational setup of their library.

1.3.3 Education

Blanksby (1988: 1) defines education as the process of systematic instruction and development of knowledge. It mainly involves background concepts, philosophies and underlying principles.

1.3.4 Training

Training is a planned and systematic effort to modify and develop knowledge, skills, attitudes through learning experiences to achieve effective performance in an activity or range of activities (Buckley & Caple, 1995: 13). This definition embraces the improvement in present task performance and individual staff improvement (also preparing them for change) which should be considered in the planning of training. Training has a component of development since it must be ongoing and cater for future needs (Kent, 1981: 46.)

1.3.5   On-the-job training

On-the-job training is a form of training where the trainee receives training within his work environment that is usually directly related to his job (Gerber, 1987: 257). The terms on-the-job training and in-service training can be used interchangeably. In this study on-the-job training includes various formal training methods (which will also take the form of courses on specific topics) and nonformal training through instruction and supervision. It forms part of general staff training and development.

1.3.6   Continuous education

Continuous education is defined by Hudson (1987: 70) as the process of keeping staff up-to-date and informed about changing procedures and policies. It follows professional education. In the practical job situation it extends to on-the-job training and sometimes overlaps. It provides a means through which individuals continue to learn and grow both personally and professionally (Conroy, 1973: 4). It is necessitated by continuous changes in the workplace. The term can be used interchangeably with continual education, continual or continuous training and continuing development.

1.4   Statement of the problem

Cataloguers are probably not well trained for the challenges they meet in practice. It has to be established how this situation can be improved. Various sub-problems can be identified.

(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 which skills are needed?

(d)   How do cataloguers in academic libraries experience the education and training they received?

(e)   What are the perception of cataloguers of their own training needs?

1.5   Aim of the study

The aim of this study is to establish what cataloguers actually do at present. An overview is given of present trends in the education and training of cataloguers, abroad and locally, and other trends in South African university libraries. A survey is done to ascertain how cataloguers working in South African academic libraries perceive their training needs.

An attempt is made to establish the training needs of cataloguers in academic libraries and to propose a structured on-the-job training programme which can contribute to the improvement of the training of cataloguers. In order for cataloguers to execute their tasks effectively it becomes necessary to establish how they should be trained on the job in order to be equipped with the necessary knowledge and skills they require.

It is hoped that this study will contribute towards the solving of problems concerning cataloguing work, specifically on the improvement of performance to satisfy user needs. The training should address the current specific and broad training and development needs of cataloguers and relate to current changes (Castelyn & Webb, 1993: 155). Well-structured continuous programmes will ensure that at least every cataloguer in university libraries will receive standard training that will meet the basic needs of cataloguing practice and be prepared for the growing job complexities in the future

1.6 Limitations of the study

The scope of this study covers all academic libraries in South Africa. These libraries need to conform to the same standards in the training of cataloguers. Their staff needs are basically the same, although not identical depending on local circumstances. The population included in this study is professional cataloguers only. Paraprofessionals and all other support staff involved in cataloguing work were not included, because it is considered that they will require a different form of training.

1.7 Methodology

The methodology for this study consisted mainly of a literature review on relevant topics, and a questionnaire, distributed to twenty two university libraries. General literature on training and professional library literature on cataloguing and cataloguers is studied to establish the basis on which this research is conducted. The findings and recommendations in the literature were used to guide the proceedings of this research project.

Questionnaires were mailed to representatives in various libraries to serve as contact persons. The population size in this study is large and geographically widely spread. The questionnaire is suitable for this population. The questionnaire questioned on factors like the status of training at the various libraries, and the perceived needs of training.

After an analysis of the findings of this survey, recommendations are made on the education and training of cataloguers in the future.

1.8 Outline of chapters

Chapter 1

General introduction of the study problem is given in this chapter. The background information together with a broad overview of the problem and the manner in which it will be tackled is outlined. The relationship of the study to human resource management is shown. Introduction to aspects of training is given, with a specific concentration on the training of cataloguers and the trends in cataloguing practice which form the background to this study. Problems of this study are indicated, the methodology used in the study is discussed and terms are defined. The chapter concludes by outlining all chapters of the dissertation.

Chapter 2

Chapter 2 discusses the tasks that are relevant to cataloguing work. Various changes in the tasks and responsibilities brought about by changes in the cataloguing environment are outlined. The knowledge and skills required in the changing practice of cataloguing are indicated. This will give a basis on which the discussion on the needs of training will be based as the changes create new needs. The skills and knowledge required for the various tasks will be identified.

Chapter 3

Chapter 3 focuses on the present cataloguers' education and training situation in South Africa and the desired changes. It points out the various factors which indicate the relationship between the two and the need for on-the-job training. The situation in the United States and the United Kingdom is discussed as trends in South Africa are likely to follow the same pattern. The various challenges faced by cataloguers in executing their tasks are discussed. The importance of considering different staff levels and their learning needs in a training programme is indicated.

Chapter 4

This chapter gives an elaborated discussion of training and all the elements of which it comprises. This principles and techniques of training are discussed here. The information forms the background to the planning and design of training programmes. Different training methods and steps in the training process are discussed.

Chapter 5

Chapter 5 provides more detail on the method of research used in this study. It explains how the research tools were administered to gather data to test the hypothesis of this study. The data and the results of the analyses are given.

Chapter 6

In chapter 6 the researcher's recommendations and conclusion, based on the research results, are given.

Chapter 2: The tasks cataloguers perform in university libraries

2.1 Introduction

The tasks cataloguers perform at present must be seen against the background of the university environment. The basic functions of the university determines the basic functions of the university library. The operations of the libraries are dictated by the missions and objectives of the parent institutions (Budd, 1998: xiii).

Universities in South Africa differ due to factors like the type of student body (part time, full time or distance education) and different academic emphases. As universities continue to redefine their missions, visions and strategic plans, all units in the university and their operations are affected. Libraries are also influenced by these characteristics and changes.

The traditional role of university libraries is collecting sources of information and making them accessible in support of the education and research functions. Great changes have however taken place in response to the changing needs of the users. Libraries in developing communities are often the only major information providers. They have an obligation to also cater for the needs of neighbouring communities, but can make their own decisions as to the level of their commitment to community involvement (Baker, 1998: 2).

Developments in technology make information accessible despite its format or location. Libraries have to deliver services taking these changes, and resultant changes in user demands, into consideration. A variety of services, including access to the Internet and remote access to other library collections and services have to be provided. Competent staff are essential for building and maintaining a useful collection and offering a variety of services relevant to a varied user community.

Various supportive tasks are carried out in the library to fulfil its function. University library structures were traditionally divided according to functions, e.g. acquisitions, cataloguing, reference and reader services (Wilson & Tauber, 1956: 161). The division was also made between direct or indirect involvement with the public, namely technical or user services (Thomas, 1997: 6). Cataloguing has traditionally been regarded as part of the technical functions of the library, since it does not include direct involvement with users. Clear-cut boundaries existed between the different departments, but structures have become more flexible as libraries change practices like decentralization (e.g. creation of service units), rather than centralizing functions.

The cataloguing function in university libraries is being affected globally by changes in the information world. Considerable changes also effect the tasks carried out by cataloguers (Trainer, 1989: 368). The way in which information sources are processed continues to change. Technology offers new techniques and sources for cataloguing. These have to be used to their maximum potential to improve cataloguing processes.

2.2   The importance of cataloguing in service provision

Cataloguing practice forms part of the history of all types of libraries. It is the process of describing library materials and identifying access points through which materials can be retrieved from library catalogues. The purpose of cataloguing according to Sauperl & Saye (1999: 79) is "to create a surrogate of a document to support access to that document". Cataloguing tasks remain important in information provision in university libraries, in spite of criticism and a negative attitude. There is still a demand for cataloguers in university libraries, especially those operating as specialist cataloguers as seen in recent job adverts. Knowledge of cataloguing is necessary for all library and information work. Cataloguing is considered to form the basis of the library and information services profession (Hill, 1998: 94, Gorman, 1992: 694 & Van der Walt, 1997: 96). The catalogue remains the key to library and information use.

2.2.1 The functions of the catalogue

The catalogue consists of the collection of records created for individual items. It should contain information to find, identify, select and locate library materials (Evans & Heft, 1994: 175). The functions of the catalogue are continually being redefined to keep pace with developments in the information world.

The traditional functions of the catalogue were stated by Cutter (Hunter & Bakewell (1991: 3) namely:

1.   It should enable a person to find a book of which either the author, title or subject is known.
2.   It should show what the library has by a given author, on a given subject, in a given kind of literature.
3.   It should assist in the choice of a book, as to its edition and character (literary or topical).

These functions have to be adapted to cater for a variety of new formats libraries have to process. Online catalogues also offer more functions than the traditional catalogue such as providing access to abstracting and indexing databases, full text, and "pass through" access to catalogues of material housed in physically diverse locations in different institutions (Norgard et al., 1993: 111). The functions of cataloguing and cataloguers are continuously redefined in relation to developments and changes.

Production of useful catalogues depends on accurate work being done by cataloguers. The professional knowledge of cataloguers enables them to fulfil their cataloguing tasks effectively. Successful retrieval of information sources depends on good quality catalogue records. Intellectual judgement is required in deciding on the application of cataloguing rules since many of them are not mandatory and they allow latitude for tailoring of descriptive cataloguing for a specific library (Evans & Heft, 1994: 185). Choices have also

21

to be made on the level of detail in the description to be used for the specific library. Cataloguers have to identify all the important information which is not always obvious. Description of especially non-book material is complicated and requires careful judgement and decision making (Evans & Heft, 1994: 260).

The allocation of class numbers and subject headings require more subject knowledge and is seen to be at a higher professional level. Providing references in the catalogue to help users find what they need is also demanding. Formulation of notes is important where necessary to provide more descriptive guidance. There is often a need for a "use of knowledge beyond cataloguing rules" (Sauperl & Saye, 1999: 89). According to Serrao & Mey (1998: 61), "cataloguing, instead of a product of practices, must always be subordinated to reason". Users benefit from the intellectual effort exercised by cataloguers to produce useful records.

2.2.2 Contribution of cataloguing to bibliographic control

Bibliographic control is described by Hickey (Raseroka, 1992: 1) as encompassing all aspects of procedures which are aimed at identifying materials and organising them or information about them for the purpose of retrieval. Behrens (1991: 44) says that bibliographic control implies having control over all the publicly available information sources. Cataloguing is aimed at describing documents for easy retrieval, identification and location. The information materials described in cataloguing ultimately form bibliographic control tools.

Each library exercises bibliographic control over its own collection. Due to a number of factors restricting the abilities of a local collection to meet user needs, it becomes essential to have bibliographic control on a broader level. Regional union catalogues, national union catalogues and access to information on an international level, becomes essential (Behrens ,1991: 44). Academic staff often need all the available information on very specific topics. Bibliographic control tools like the catalogue are invaluable for this

purpose. Correct and complete cataloguing according to acceptable standards at local level is essential for the creation of bibliographic tools. At national level an extra burden is placed on library and information services which have to upgrade records which where originally created by others (Behrens, 1996: 76).

2.3 Cataloguing

Books were traditionally the main sources catalogued manually in libraries. New ways of publishing information were introduced and libraries adopted new ways of operation. There are various perspectives in the literature on the present nature of the tasks performed by cataloguers.

The philosophy of cataloguing remains the same as it was traditionally (White, 1987: 48). The ultimate aim is centered around the creation of a representation of a record to allow access to that record. Significant changes are however continuing to take place in the manner of execution of this task. New tasks are also being introduced. Discussion of cataloguing tasks necessitates a consideration of the possible future that may be brought about by constant change. Of concern in this study will also be the differentiation and relationship between professional duties and nonprofessional ones, since this study concentrates specifically on professional cataloguers.

2.3.1 Specific cataloguing tasks

2.3.1.1 *Bibliographic description*

Descriptive cataloguing is concerned with the description of an item in terms of important bibliographic information, assigning access points, creating authority records and MARC coding. MARC coding was added with the advent of computerised cataloguing (Gorman, 1990: 63). Cataloguers are under pressure to acquire knowledge and new skills to be able to handle the increase in sophistication of the materials they process. In a university

library environment, with its large collections of varying formats, a variety of bibliographic sources are necessary to gather bibliographic data to process the different library materials.

Bibliographic description is meant to help with the retrieval and identification of items. The characteristics for description may be of a "physical nature (items characteristics), a content or a relationship nature (works' characteristics)" (Serrao and Mey, 1998: 49). The description includes information on title, author, publisher, physical characteristics, etc. It should contain sufficient detail to guide users to find and identify relevant sources. Item bibliographic records are created out of the descriptions. The traditional standard used by South African university libraries is the second edition of the Anglo American Cataloguing Rules (AACR2). This standard is internationally recognised and allows the exchange of bibliographic information. It guides on the different levels and important points of describing information materials and description of various forms of material formats, including technological.

Various new formats are difficult to describe, such as videos, for example, with their lack of duration, unclear titles, producers, etc. Journals and other ongoing publications also have unique characteristics like title changes, numbering, etc. Cataloguers should have a thorough knowledge of the rules for the description and provision of access points to all kinds of library material (Gorman & Winkler, 1988: 1).

Cataloguers have to keep up to date with updates and revisions in standards. Latest developments on AACR2 are available on its web site (www.nlc-bnc.ca/jsc/index.html). Cataloguers also have to be able to make contributions to changes in rules and standards. The rules are not static and can be changed to respond to new needs (Gorman & Winkler, 1988: xiii). They remain a reliable means of guiding the description of library materials. Cataloguers apply their knowledge of the rules on the information they get from the materials they handle to do the description.

There are a number of bibliographic sources available in both print and computerised form like publishers' catalogues, indexing and bibliographic databases and special source files for special collections like reports, dissertations, government documents, etc. (Romero, 1994: 210). Cataloguers can acquire additional bibliographic information from these sources in order to give correct and full bibliographic description. Information can also be downloaded from various databases, other catalogues and the Internet. Proficiency is necessary in searching the various sources in order to retrieve the required information. Research should continuously be done to identify useful reference sources.

2.3.1.2   *Allocation of bibliographic access points*

Cataloguers assign access points or headings to bibliographic descriptions. The cataloguing standard (AACR2) have rules regarding the allocation of access points. AACR2 (Gorman & Winkler, 1988: 615) defines an access point as a name, term, code, etc., under which a bibliographic record may be searched and identified. Access points can be titles, authors, cooperate authors, conference names, subject headings, etc. Decisions have to be made on choice and form of access points. Targeted users must also be considered in the allocation of access points, like the allocation of more than one subject headings if considered necessary. Cataloguers have to decide on main access points and which other access points to be added to improve search success. Consistency has to be maintained in the choice and form of headings. Subject knowledge and knowledge of rules is important to identify access points especially from materials of unique features like non-book materials (Serrao & Mey, 1998: 54). This is a professional function. Collective responsibility for such materials, e.g. the producers and directors of videos is one such problem in determining access points (Gorman & Winkler, 1988 : 186).

2.3.1.3   MARC coding

MARC coding is the process of assigning machine-readable codes to bibliographic information. A MARC-based record prepares data for computer recognition and manipulation, permitting the exchange and sharing of records across various automated systems (Millsap & Ferl, 1997: 7). There are various forms of MARC format, e.g. UNIMARC, MARC21, UKMARC, SAMARC. SAMARC was until lately the standard coding format used for computerized cataloguing in South African libraries.

Discussions were held in 1996 on the adoption of MARC21 for South African library records. The new MARC was voted for. The Gaelic consortium in South Africa has adopted the INNOPAC system which is completely based on MARC21. All libraries joining the consortium will have their records converted to the MARC21. SABINET has also adopted the MARC21 which means that the SAcat will also be in MARC21 format. All member libraries cataloguing directly on SABINET are affected as they have to do so in the new MARC format. The manner in which cataloguing tasks are performed keeps on changing.

Cataloguing is affected by these changes as new items must be catalogued according to this new format. Conversion of old records has to be effected also. Cataloguers must be trained in using this new format and they will in turn have to offer training to other nonprofessional staff involved in cataloguing.

Cataloguers need to have knowledge of MARC21 format and its manuals. The coding of library materials according to MARC21 format requires an understanding of the rules of cataloguing and of technology. Cataloguers have to keep up to date with changes in MARC21. As new information formats emerge, it becomes necessary to know how to code their bibliographic detail. Cataloguing rules and the MARC21 are related and have to correspond. Precision in coding is important as errors may result in poor retrieval and exchange of information.

2.3.1.4   *Subject cataloguing*

Subject cataloguing involves intellectual analysis of items and the allocation of relevant subject headings (Levy, 1995: 3). Professionals do subject analysis of materials in depth (White, 1987: 49). It is meant to allow subject searching from the catalogue. It is very important in the academic library environment where subject searching is relied on for study and research projects. LC Subject Headings are mainly used as a basis for controlled vocabulary. Outdated terminology is often criticized, as well as inconsistency, unpredictable forms and missing headings. South African cataloguers expressed at the Seminar on Bibliographic Standards the need for adding a list of South African headings to Library of Congress Subject Headings and mutually accepted standards. This will improve searches in subjects of local orientation and interest.

Classification collocates works on a subject by bringing them together (Evans & Heft, 1994: 209). It provides shelf location for items, and allows browsing at the same time since materials on common subjects are brought together. Cataloguers assign classification numbers according to subject groupings. Knowledge of classification principles and practice is essential for classification. The Dewey Decimal Classification system is used by most university libraries in the country. The CD format Dewey for Windows also makes the requirement of competency in technological searching more necessary. The concept "subject cataloguing" is sometimes used as inclusive of the classification process. This is because, as stated by Hunter & Bakewell (1991: 4), "the same mental process must take place when deciding on the subject of an item, whether this is described in alphabetical terms or by a classification number". The aim is to show the content of the library's holdings.

2.3.1.5   *Authority work*

The steps required to determine the choice of the form of access points is called authority work or authority control (Evans & Heft, 1994: 334). Authority forms for names, series,

subjects and uniform titles are established to be used as access points. Authority work is performed to maintain the collocation function of a catalogue (Evans & Heft, 1994: 334). This means that items by the same author and on the same subject are brought together under one form. Authority records are also used to ensure consistency in the catalogue based on agreements made on acceptable headings to be used in an individual library or at cooperative level. Various sources like the Library of Congress Subject Headings and Library of Congress Name Headings are used to maintain the records.

Authority work also implies the making of references. References (e.g. see or see also) are made from various forms of headings to the one established as a standard and also to connect headings of related entities (Gorman, 1990: 86). Cross references are also made to direct the users to authority forms used in the catalogue. Users are not aware of the standards used to determine the authority forms and cataloguers must guide them. Authority control provides the relationships between items in a library catalogue (Jeng, 1997: 116). References help to make the catalogue as comprehensive as possible to cater for various subject search approaches and various levels of sophistication of library users.

Professional cataloguers are presently chiefly responsible for the maintenance of authority files in the online catalogue. Authority work is also performed when conflicts are discovered when a new entry is made and when changes have to be effected because of changes introduced in sources of authority used.

In a decentralized environment where no specialization in cataloguing is present, strict authority control has to be practised in order to maintain high standards of cataloguing. Expertise among new staff in cataloguing may take longer to develop since many other duties are performed at the same time. Authority control is also very important in the cooperative catalogues where strict heading consistency has to be observed. Computers have simplified this process in that merging and global changes can be done easily (Gosling, 1991: 13).

2.3.2 Additional tasks

Cataloguers in university libraries, who still operate in the traditional sense of doing cataloguing work only, often perform other tasks supportive to cataloguing and still others which do not fall within the scope of cataloguing. These tasks are performed in the spirit of cooperation between all library functions to serve the user efficiently and effectively. Other administrative duties like reports, budgets and correspondence also form part of the daily tasks.

Multiskilling is common at present and is another reason why cataloguers have to do other duties outside cataloguing. These tasks take up a lot of the cataloguing staff"s time. Such tasks include library orientation, bibliographic instruction, reference services, and involvement in committees outside their department (Gorman, 1995: 33). The common practice in university libraries is that cataloguers have always been expected to take up additional duties whilst there has been little or no involvement of other professionals in cataloguing (Steinhagen & Moynahan, 1998 :14). With the practice of decentralization, cataloguers will be responsible for both cataloguing work and public service.

Hiatt (1987: 122) lists the supplementary knowledge and skills required by cataloguers to perform their tasks as the knowledge of cataloguing rules, ability to search, organize and record bibliographic data with accuracy and attention to detail and good communication abilities to read and understand procedural guidelines and to compose bibliographic notes necessary to cataloguing. Knowledge on where and how to find the important information to describe material is required. The cataloguer should have the skill to search items to find all important descriptive information. Knowledge of basic tools like the AACR2, MARC21, LC subject headings, classification schemes and additional bibliographic sources for verification is essential. Studwell (1996: 51) indicates that there is nothing automatic or guaranteed about cataloguing, but heavy intellectual engagement to interpret the standards and use them consistently is required.

2.4   Distinguishing between professional and nonprofessional tasks

Most libraries have several categories of staff in their cataloguing departments depending on the skills required and the complexity of the work performed by each category. Most professional cataloguers in South African university libraries hold a Library and Information Science degree or a degree plus a diploma in Library and Information Science. Other staff categories are the para-professionals with other qualifications or diplomas and clerical staff. This distinction was drawn in the 1970s in South Africa (Kerkham, 1988: 7)

Much uncertainty exists as to the difference between professional and nonprofessional tasks in cataloguing (Mohr & Schuneman, 1997: 205). The division is based on the fact that they do not require equal expertise. It is important that clear job descriptions differentiate between professional and nonprofessional tasks.

2.4.1 Professional tasks

The traditional main duty of cataloguers was the creation of bibliographic records. All their tasks were centred around three basic functions, namely descriptive cataloguing, subject cataloguing and classification (Serrao & Mey, 1998: 48). The principles of bibliographic access established in the past forms the basis for these cataloguing functions. Other ancillary tasks like the physical preparation of information material are also performed as part of cataloguing functions. These functions are carried out to achieve the purpose of processing library materials for easy retrieval and access by library users. Catalogue production and maintenance has the aim of guiding users in the retrieval of information sources. All cataloguing tasks are jointly geared towards making library materials easily accessible to users.

Some tasks will continue to be done by professional librarians for some time even in the face of change. These tasks are original cataloguing, authority control, database

management and general management of cataloguing affairs. Performance of these tasks requires professional knowledge (Coetzee, 1995: 150).

2.4.1.1   Original cataloguing

Original cataloguing is likely to remain the responsibility of professional cataloguers in South African university libraries for the foreseeable future. There is an increasing involvement of paraprofessionals in original cataloguing in other countries (Sullivan, 1992: 85). The disadvantage of the involvement of nonprofessionals in original cataloguing includes the need for more training and increased quality control (Eskoz, 1990: 384). The decrease in original cataloguing has led to a situation where it is performed together with many other library functions. Formation of service units operating according to subject specialties is one option where different functions are coupled together. A common practice is the assignment of both cataloguing and reference work to the librarians (Thomas, 1997: 9).

Descriptive cataloguing, subject cataloguing and classification form part of original cataloguing. The increase of locally produced information, such as government publications, makes original cataloguing a necessity even in contemporary circumstances where shared cataloguing is prominent. Someone must catalogue the original item, before it can be shared. Descriptive cataloguing must be done according to accepted standards. Standards continue to gain importance in a record sharing environment.

Deliberations about the possibilities of nonprofessional staff being involved increasingly in original cataloguing indicate that professionals will do original cataloguing of materials in special formats and showing specific characteristics (Buttlar & Garcha, 1998: 314). Nonprofessionals may concentrate on original cataloguing of less complicated material (Kerkham, 1988: 9). In university libraries, in depth subject analysis will remain the responsibility of professionals (White, 1987: 49). The trend is that most cataloguing tasks

will be transferred to nonprofessional staff, as copy cataloguing is increasing and the need for original cataloguing is minimised.

2.4.1.2   *Authority control*

Hill (1988: 97) indicates that strict heading consistency and control are essential in online catalogues. Wrong or unnecessary new authority forms can only make the catalogue difficult to use by complicating the retrieval of records.   Coupled with error correction, authority control will improve the usability of the catalogue. This can be done by providing additional access points, cross references, etc. (Racine, 1991: 123). Global changes to authority files can easily be effected online (Gosling, 1988: 13). Highly skilled cataloguers are required to perform these functions, as a number of records can be spoiled when wrong changes are made.

2.1.4.3   *Database management*

"Catalogue management" will evolve into "database management" with increasing automation of the cataloguing processes and product of cataloguing (Hill, 1988: 97). Cataloguers must take the responsibility as "managers" of the cataloguing process. Catalogue records are entered in online catalogues using the same rules as the traditional card catalogues. Professional cataloguers have to ensure adherence to these rules by all cataloguers. Cataloguers often have to make decisions on the types of catalogue information suitable for their users. This involves decisions on issues like the level of data to be displayed for item description and the format of data display.

Professionals have a responsibility to ensure error free and complete records. They will also have to effect changes to the catalogue records that need critical decisions making.

2.1.4.4   Management of cataloguing affairs

The reduction of routine tasks will enrich the professional's job but it also means a decrease in the number of professional cataloguers. The changes may not take place as fast as some theorists of change predict. Lephoto (1996: 31) states that we are going to experience a reskilling of cataloguers for changed roles. More of the routine tasks will shift to nonprofessional staff and professionals will take up more of the management functions.

There must be local overseeing of cataloguing services in bigger libraries like university libraries, and some authors are of the opinion that this could remain the duty of a few "expert cataloguers" (Brindley, 1988: 3). Policy formulation, problem solving, implementation of strategies and in-service training form part of the management functions to be performed by professional staff (Coetzee, 1995: 150). Cataloguers continue to have a future in cataloguing work even if total outsourcing of cataloguing work in libraries takes place. El-Sherbini & Klim (1997: 290) indicate some of the responsibilities that will still have to be done by cataloguers, namely to negotiate contracts, write specifications, set up delivery systems, oversee the cataloguing and systems operation, provide quality control and monitor budgets and expenditures.

2.4.2 Nonprofessional tasks

2.4.2.1   Copy cataloguing

The division of duties into original cataloguing and copy cataloguing increased with the practice of shared cataloguing (Eskoz, 1990: 383). Copy cataloguing is the process of copying existing bibliographic records into one's catalogue. It is less complicated and is usually assigned to nonprofessional staff (Hudson, 1987: 70). Sometimes it is necessary to adapt those records to suit local practices like shelving methods and adding more subject headings of local user interest. As Hill (1988: 96) indicates "if a copy has to be highly

33

scrutinized, or if it must be substantially altered, highly trained nonprofessionals are needed". As indicated earlier, professional judgement might be required.

2.4.2.2   *Catalogue production and maintenance*

Cataloguers are currently responsible for the production and maintenance of the catalogue. Provision of up to date and usable catalogues are important functions of cataloguing. A catalogue's primary function is to describe particular items in a particular collection (Levy, 1995: 33). The OPAC is a common form of catalogue in university libraries. Nonprofessional staff can be involved in data entry into the system which will ultimately form the catalogue. Data can easily be manipulated with the use of technology (Gosling, 1991: 13). This has simplified the production and maintenance functions of cataloguing.

The purpose of maintenance is to eliminate incorrect, incomplete records and general updating of the catalogue (Morris, 1991: 81). Libraries with computerised catalogues do maintenance online. This has made maintenance procedures easier compared to the traditional card catalogue. Updating and error correction is easier and batch processing and merges can be performed on many records at a time (Gosling, 1991: 13). Some aspects of maintaining a catalogue need the knowledge of professional staff (Eskoz,1990: 389). Catalogue maintenance is an ongoing activity.

2.4.2.3   *Physical preparation of material*

The catalogued material is physically prepared by affixing the labels indicating the call or location number. This should be done by clerical staff leaving other staff more time to attend to complex tasks. The way preparation is done differs from library to library. Some still use a typewriter to make spine labels but production of labels is now possible automatically. Staff time is saved and accuracy improved. Other trivial duties like the fixing of torn pages and weak binding and the attaching of route slips when missing,

amongst others, take considerable staff time. Professional cataloguers may not be directly involved but they come across such issues daily.

Various other tasks are also performed by cataloguing staff depending on operations in their various libraries. These include bar coding, property stamping, inserting security strips and affixing pockets. Instruction in the use of the catalogue is also often a duty cataloguers have to perform.

2.5   Factors causing changes in the tasks cataloguers perform

Significant changes have occurred in the execution of cataloguing tasks (Trainer, 1989: 368). Changes in information publishing and technology are the cause. Some traditional tasks have become obsolete, e.g. catalogue card filing (Hill, 1988: 91). Changes in the remaining tasks have occurred, while new tasks have evolved. The way information sources are processed in libraries has changed and will definitely continue to do so. The changes can be attributed to several factors as discussed below.

2.5.1   The information explosion

Information is being generated at high speed, in huge volumes and in various formats, also as result of the advancement in technology. Libraries and information centres have problems in handling the vast amount of information. The mass of resources now available includes many that are useful in current research (Lange & Winkler, 1997: 66). Libraries also experience competition from information suppliers like the Internet. Users need simplified access to a wider range of materials. It is essential to arrange information in a variety of forms and make it accessible.

Cataloguers need to find ways of dealing with these high volumes of information sources and increase the speed of handling their collections to have them ready for the shelves quickly.

2.5.2 New formats

Information sources that have to be processed are continuously changing in format. New formats are developed. University libraries receive many information sources that vary greatly from the traditional book format. New formats are microforms, video cassettes, audio cassettes, CDs, electronic publications, software, etc. (Gosling, 1991: 10 and Evans & Heft 1994: 10). These new formats challenge the traditional way in which materials were handled in libraries. They have unique features which present new challenges to cataloguing.

Discussions and experimentation are taking place on cataloguing Internet resources. Lange & Winkler (1997: 66) say cataloguing carries its strength into the digital world. The OCLC Cooperate Online Resources Catalogue (CORC) project explores the cooperative creation of a catalogue of Internet resources (Hickey, 1998: 5). This catalogue allows dynamic generation of web pages with resources of interest to users. A decision has to be taken on which web resources must be catalogued. The background of cataloguers regarding bibliographic record construction and retrieval puts them at an advantage to do this work (Holt, 1995: 34).

The standards of cataloguing like AACR2 and MARC are internationally recognized for cataloguing. The basic principles of cataloguing for all material types are the same but continuous revision of rules is necessary to guide the cataloguing of new formats. The revision of traditional standards like AACR2 caters for the cataloguing of the new formats by continuous revision (Evans & Heft, 1994: 260).

2.5.3 Increase in electronic resources

The introduction of new cataloguing tools which are technologically driven has enabled cataloguers access to various useful resources. Additional resources, like AACR2, LC Subject headings, Dewey for Windows, various catalogues, bibliographies, and

36

professional journals (e.g. Cataloguing and Classification Quarterly) are available on CD-ROM, online databases and through the Internet (Hill, 1997: 80). Recent literature on cataloguing developments is of importance to keep cataloguers up to date in their field.

More specialized sources like Government materials databases are also often required for processing library materials with unique characteristics (Gosling, 1991: 11). Sauperl & Saye (1999: 89) emphasise the need for improvement of cataloguers' workstations (e.g. replacement of dumb terminals with PCs) to allow access to electronic versions of cataloguing resources. The Internet allows access to additional resource such as other library catalogues, contact with colleagues, contact with suppliers, publishers and various vendors. Knowledge of search techniques is important in consulting these sources.

Cataloguers have to keep track of new resources and related technological developments and learn how to use them effectively to achieve improved quality and quantity in their work. Cataloguing is considered very costly and every means to make it cost effective must be utilized maximally (Hill, 1988: 95). This often requires cataloguers to acquire new knowledge and skills in using technology.

2.5.4 Availability of cataloguing copy

The importance and use of copy cataloguing is on the increase as it offers a solution to the problem of duplication of cataloguing of the same sources by various institutions. Bibliographic networks allow copying of records created by others. It also addresses the problem of the length of time materials spend in processing before they reach the shelves. All libraries that contribute to cooperative catalogues in the country must provide quality records acceptable to others. The ease with which copy cataloguing can be performed has made this job suitable to be performed by nonprofessional staff (Hudson, 1987: 70).

2.6 Implications of networks and consortia for cataloguers

Various forms of cooperation, facilitated by networking and technological innovations, exist today. There is a need for well-trained cataloguers, especially new practitioners, to operate in such a cooperative environment and in consortia (Van der Walt, 1997: 88). Individual libraries contribute their records and authority records to the cataloguing pool.

Cooperative cataloguing challenges the traditional practice of cataloguing. Original cataloguing decreases significantly with increased copy cataloguing. Libraries share their records and can import records from various other large databases like OCLC. Authority control becomes more important in a cooperative cataloguing environment (Coetzee, 1990: 45). Various concerns will remain in the sharing environment like the level of acceptability of some of the records that can be copied. There has always been concern about the standards of cataloguing of some libraries. Oelofse (1996: 121) indicated at the Seminar on Bibliographic Standards that the quality of a large percentage of records in the South African Union Catalogue is poor. Cataloguing work done at the local level is very important and should meet the required standards to enable and facilitate sharing. The Cooperative Cataloguing Council in the United States (Swanenkamp, 1998: 52) and CALICO in South Africa (Van der Walt, 1997 : 92) have initiated cooperative training necessary for a cooperative environment for libraries. These moves support the need for cooperative training.

Larger university libraries are expected to have fewer professionals occupying cataloguing posts in the near future with the decrease in original cataloguing. Rather, subject orientation where all professionals will do both cataloguing and reference duties will be common. As observed by Buttlar & Garcha (1998: 320), job sharing among these librarians is on the increase. It promotes flexible and maximal utilization of professional staff to improve service to users in the face of resource scarcity and cuts.

2.7   New skills needed by professional cataloguers

Cataloguing tasks are undergoing transformation as a result of changing technology. The goal of cataloguing remains the same but the means of accomplishing the goals are constantly changing and adapting to new conditions (Racine, 1991: 128). Skills required by cataloguers in university libraries are changing and more are required. The present role of the cataloguer may become even broader in the future to include other library tasks (Revill, 1987: 74). The tasks mentioned by El-Sherbini & Klim (1997: 32) include management, reference, training and database management.

In decentralised environments, fewer people will in the future be called "cataloguers". According to Buttlar & Garcha (1998: 320), the term "cataloguer" will be replaced by another term or title that would be more relevant. New knowledge and skills need to be acquired in current and future cataloguing practice (Hill, 1997: 75).

2.7.1   Public service skills

Few South African University libraries have changed their cataloguing to a decentralized system. Decentralization will probably increase as more libraries join consortia. Cataloguers will be required to improve or acquire skills to work directly with users (White, 1987: 48). This practice will be to the advantage of cataloguers. The traditional division between public service and technical service has created the image of cataloguers doing backroom work and being of less value. Many do not realize that successful service depends on quality bibliographic information in catalogues.

Decentralization will also give cataloguers the opportunity to work with the product they create, namely the catalogue (Steinhagen & Moynahan, 1998: 16). They will now be able to learn how users use the catalogue and problems they encounter and can continuously make improvements where necessary.   Multiple job functions will mean reorganization of cataloguing job divisions and workstations. Some disadvantages are

likely, such as staff resistance to change, and the compromise of quality cataloguing (Buttlar & Garcha, 1998: 320). Conflict of reporting to managers of various library functions and time sharing among the different duties is sometimes experienced in a multiple job kind of operational environment (Brindley, 1988: 3).

2.7.2 Supervision skills

Professional cataloguers will remain as providers of leadership in bibliographic control (Racine, 1991: 128). They will play a leading role in the creation of bibliographic records. They will be responsible for quality control and authority control for all work done by nonprofessional staff and will evaluate staff performance. Professional cataloguers will be responsible to help cataloguing staff solve problems they encounter in their daily work.

Shared cataloguing requires quality work and strict adherence to standards. Cataloguers with an in-depth knowledge of cataloguing rules and standards will assume increased responsibility in this regard. Accountability is more important in a shared cataloguing environment and authority control is essential.

Cataloguers will also have to plan and supervise various projects like retrospective cataloguing, reclassification and systems change over (Coetzee, 1995: 150). Cataloguers will also have to supervise staff, especially new staff, knowledgeable in various other fields, such as foreign languages or technology (Racine, 1991: 22). This means that supervising cataloguers will have to have sufficient technological background and wide library and information practice experience.

2.7.3 Training skills

The cataloguing manager will be responsible for implementing changes in cataloguing and identify the training required and the people to be trained. (Racine, 1991: 14).

Training has to be continuous to keep up with the pace of change. Professional cataloguers are responsible for the training of nonprofessionl staff (Trainer, 1989: 369). They have to plan the necessary programmes for training and ensure their success.

2.7.4 Database management skills

With increased automation of the cataloguing processes and products, broad knowledge of technology is necessary (Hill, 1988: 98). Cataloguers must acquire additional skills in hardware, software and related technologies like telecommunications, networking and integrated systems.

With the use of online catalogues, cataloguers have already assumed the role of database managers. They will also be evaluators, selectors and purchasers of cataloguing software and related tools (Gosling, 1991: 13). Knowledge of technology and its application to cataloguing is needed to be able to liaise with system providers, from the initial stages of negotiation of contracts through systems design, until and after implementation. Continuous maintenance will necessitate communication with the vendors on all changes introduced and all problems encountered in system use. Networking of the cataloguing function will require the facilitator to increase knowledge of bibliographic networking and its operation.

The introduction of online catalogues has made it necessary that old, manually catalogued collections be converted retrospectively. Cataloguers who have already been involved in projects of this kind indicate that the project is complex, costly and time consuming. Project management skills together with knowledge of cataloguing intricacies are required. Involvement in cataloguing cooperatives will also necessitate contribution by member libraries and retrospective conversion of old records (Steinhagen & Moynahan, 1998: 7). These procedures will have to be supervised.

The OPACs have brought about some changes in retrieval procedures. Data can easily be manipulated and retrieved in a variety of ways. The ease of use brings about increased demand by users for added features (Evans & Heft, 1994: 208). Cataloguers therefore have to research continuously to find new ways to improve the catalogue and make it more useful to their users. Involvement in research in the development of the OPAC will be another important function of the cataloguer. Software is continually revised by the producers and cataloguers have to give input to these revisions.

Catalogues available on nationwide databases are widely accessible and open for wider use and scrutiny (Romero, 1994: 210). Most university library catalogues are now on the World wide web. The need for efficiency by individual libraries increases as a result of this development. University library catalogues will in future be expected to act as electronic gateways to other digital resources (Baker, 1998: 2). The catalogue will take the form of a mixture of local and many other libraries' information, together with other web information. With the technology, various manipulations are possible. Cataloguers need to be well equipped to function in such integrative environments.

Management of cooperative databases also entails the overseeing of general quality, correction of errors and the updating of the catalogue records and authority files.

2.7.5 Management skills

Management of technical services is considered a function of professional librarians (Intner & Hill, 1986: 44). Professional cataloguers will have to develop policies to regulate cataloguing activities to keep up with change. Various other managerial functions, like human resources management and continuous research, are needed to keep abreast of new developments.

Literature indicates that the role of the professional cataloguer will shift more towards management.. A decrease in cataloguers at lower levels is inevitable with the few

42

remaining acting as managers. Management already forms a part of the duties of senior cataloguers. Future cataloguers will need to acquire more managerial skills to be able to carry out their responsibilities. Fundamental managerial functions are planning, organizing, leading and controlling (Smit & Cronje, 1992: 4).

2.7.6 Communication skills

The cataloguing supervisor will represent the staff involved in cataloguing at management level, where decisions affecting their work will be taken. He or she should lead in communication with various stakeholders. Liaison with various network and consortium members will increase as these practices increase. Professional cataloguers will have to communicate with to their staff and ensure that cooperative agreements and changes are effected.

2.8 Conclusion

Cataloguing is an important information provision function that has a long history in the operation of university libraries and has a future which may be affected by the trends taking place in the information world. These changes have already had an effect on the way tasks are executed but not on the role of cataloguing. The situation in South Africa is such that one cannot talk of cataloguing as a dying art for some time yet. The demand for cataloguers will still be reasonable. It will however be affected in a similar way to other jobs by high unemployment rates. Poor economic conditions lead to staff cuts. Cataloguing has a future in information provision. It is becoming increasingly important with information proliferation and a growing need to organize and guide. It still plays an important role even in the electronic publication era (Lange & Winkler, 1998: 66).

Future professional cataloguers are expected to be cataloguing managers. This will mean an added responsibility and the challenge to increase their knowledge in all the operations in cataloguing and how they interrelate with other library functions.

Cataloguers have to perform their duties with a purpose in mind, which is service to users.

Changes will however take place in the tasks and responsibilities of cataloguers. Decentralised cataloguing where cataloguers will take on other responsibilities which are directly service oriented like reference work will be responsible for many changes. Professionals will no longer specialize by function (Eskoz, 1990: 384). This transition will improve the negative image attached to cataloguing work. Traditional work boundaries, which sometimes made cooperation between sections difficult, will be broken. More library workers will also have an opportunity to get acquainted with record creation, which is considered important for all library and information workers (Gorman, 1992: 694).

It is however very likely that a reduction in the efficiency of cataloguing performance will be experienced especially during the transitional period. Training and improvement on existing practices will be useful to guard against the lowering of standards of cataloguing which will be very expensive to correct later. Cataloguers must have a futuristic outlook and prepare for new job opportunities in university libraries and even outside, to occupy jobs in outsourcing companies

Chapter 3 : Education of cataloguers

3.1 Introduction

Education and training of cataloguers are two related processes. Education takes place at a library school and lays the foundation on which training on-the-job takes place. The main focus of library schools is pre-service training (Van der Walt, 1997: 88). Specific job training is the chief responsibility of the employer. It starts when a cataloguer starts working (i.e. on-the-job training) and continues throughout the work life (continuous education). The success of training on-the-job is partly dependent on the education received by the trainee. As indicated by Gordon (1994: 2), the distinction between formal education and training is becoming blurred. More specific knowledge and skills are integrated into the curriculum. In the job situation, employees also sometimes need to engage in formal education to develop themselves to perform better.

Other factors like an interest in cataloguing and the length of time between graduating and starting to catalogue also influence the readiness of a cataloguer to begin cataloguing. The level of knowledge and skills possessed by library and information science graduates determines the kind of training employing libraries have to give.

Teaching is affected by the continuous changes taking place in library and information practice. Teachers, library and information practitioners and professional bodies have a long history of continuously engaging in discussions aimed at achieving the common goal of the best possible service to users.

3.2 Education of cataloguers

Education for the library and information profession is being offered by several universities and technikons in South Africa. Universities traditionally offered degrees in this field whilst technikons offered diplomas, basically for paraprofessionals. Technikons

45

have now introduced a B.Tech. degree in the library and information field. It is not yet clear as to whether the degrees offered by the two types of institutions are equivalent. Stillwell (1997: 209) states that it is not clear whether employing libraries will employ people with the technikon degrees as professionals. Some uncertainty exists among practitioners who qualified from universities as to whether they should be equated with their colleagues from technikons.

The emphasis in the training of technikons is on acquiring skills for specific jobs. Universities cover a wide scope of background theory (Raju & Brink, 1997). Both approaches are important in the design of a comprehensive curriculum since both theory and practice is essential for a balanced library and information professional education. The equivalence of the status of both the qualifications is not yet agreed upon (Stillwell, 1997: 209).

The education of library professionals is currently under debate (Stillwell, 1997: 207). Environmental changes affecting both teaching schools and libraries and change in higher education in South Africa necessitates change in education programmes and regulations. Library and Information Science education, training and qualifications, like all other fields, have to offer programmes that fit into the National Qualifications Framework (NQF) as set by South African Qualification Authority (SAQA) (Stillwell, 1997: 207).

The revision and adaptation of the curriculum will always be necessary in order to remain relevant and to produce marketable professionals. The historical links South Africa has, especially with the United Kingdom and the United States, have dominated the direction and general character of professional education in librarianship (Dick, 1998: 34). Not much has been published in South Africa about the education and training of cataloguers. The situation in the United Kingdom and the United States will be discussed as background to the South African situation.

3.2.1 Education of cataloguers in the United States of America and in the United Kingdom

There are important factors to note from cataloguing education and its development in the United States and the United Kingdom which relate to conditions in South Africa. Future developments in this county can also be predicted from developments in these two countries, such as:

(a)   Practitioners hold views that education does not meet the needs of cataloguing practice. Entry-level cataloguers are usually not sufficiently prepared for their first job (Jeng, 1997: 114 & Hill, 1988: 76).

(b)   In the United States and United Kingdom cataloguing is an optional course (Van der Walt, 1997: 96). Some library schools are omitting cataloguing from the core curriculum (Clark, 1993: 33 & Jeng, 1997: 114). The exaggerated emphasis on automation leads to elimination of cataloguing as a core subject in library and information studies (Clark, 1993: 33). This may imply decreased importance attached to cataloguing as a necessary foundation course for all library and information professionals. It is however felt by some that core parts are to be learned by all and elective areas for specialization (Gorman, 1992: 694).

(c)   Cataloguing curriculum needs redesigning. Course content and job requirements must correspond (Coutts, 1991: 10). Cataloguing course descriptions are generally vague (Sellberg, 1988: 37). Curriculum development is disorderly and unplanned. Curriculum varies from school to school and there is no agreement amongst the schools about the time devoted to cataloguing (Clark, 1993: 30 & Sellberg, 1988: 31).

(d)   There is still an imbalance between theory and practice in the teaching of cataloguing (Sellberg, 1988: 32).

47

(e)   Practitioners and educators are responsible for the prevailing situation in education (Gorman, 1992: 694) and their combined efforts can change the situation. There is need for increased cooperation between them towards cataloguer education and training. The two parties are also responsible for the improved image of cataloguing in library and information services (Clark, 1993: 30).

3.2.2 Education of cataloguers in South Africa

As stated by Coetzee (1995: 157), no reliable information exists in South Africa about what employers think about the quality of education in cataloguing of graduates from South African institutions involved in cataloguing work. General dissatisfaction was raised through discussions held with the employers by the former author.

Both cataloguing educators and practitioners are addressing the education and training needs of the profession. The revision of the Library and Information Science curricula was one of the topics debated at the SAILIS conference in September 1997. Educators have a part to play in both education and training but concentrate more on imparting background knowledge and principles (Jurow, 1992: 15), whilst employing libraries have to provide on-the-job training and create viable conditions for continuous training. Discussions should continue in order to find ways to work together to find solutions to the problems and the challenges facing cataloguers in the continuously changing working environment. At the SAILIS annual conference in 1997, working committees were suggested to look into this question and how it can be addressed. The need is realised but as yet nothing has been done.

Current LIS education is characterised by ambiguity, contradicting impulses, ongoing debate and uneven development (Dick, 1998: 52). The research by Coetzee (1995) on the status of cataloguing education in South Africa revealed different approaches by various institutions teaching cataloguing. Stillwell (1998: 7) and Coetzee (1995: 149)

support the idea of maintaining a core curriculum of which cataloguing should be part. Cataloguing can still be regarded as a core subject even in a cooperative environment (Van der Walt, 1997: 96). It offers the fundamental knowledge for all library services.

Practitioners in cataloguing in some South African university libraries have come to the conclusion that the cataloguing knowledge and skills of students have deteriorated. There appears to be a loss of interest in cataloguing. The situation can partly be blamed on education and affects cataloguing practice in general.

3.2.3 Reasons for the waning of interest in cataloguing as a profession

With the increased use of technology for cataloguing purposes, less original cataloguing needs to be done. The notion that cataloguing is slowly phasing out with an increase in copy cataloguing (Coetzee, 1995: 148) and the fact that paraprofessionals are doing some cataloguing duties (Intner & Hill, 1986: 41) has led to general loss of interest in this aspect of library work and thus less value has become attached to its study. This waning of interest is evident and can be attributed to several factors:

(a)   Phasing out of examinations on practical cataloguing. This suggest a decrease in the importance attached to acquiring this skill. Practical cataloguing is no longer a final examination subject any more in some library and information schools. Less time is also allocated to practical cataloguing during the study period. This can lead to a decrease in the level of practical skills acquired.

(b)   Insufficient time allocated to teaching and practical cataloguing. There is no standard for this at institutions offering cataloguing education (Coetzee, 1995: 152). Course duration should allow for enough time to be devoted to cataloguing theory to achieve an understanding of the fundamental importance of cataloguing in information provision (Van Brakel, 1990: 192). Romero (1996: 3) states that cataloguing is a course in which knowledge is based on techniques and skills and

would benefit from a balance between theory and practice. There is need for coordination between teaching of theory and practical work. The practicals and an internship done as part of professional qualification requirements are not sufficient. Students are usually assigned to clerical work during their practicals in libraries and they develop negative perceptions of cataloguing as a less challenging job (Nassimbeni, 1990: 157). The few days or weeks spent on cataloguing are not sufficient to ensure that skills have been mastered and an interest developed in cataloguing as a possible job.

(c)   Lack of interest and enthusiasm from students and cataloguing educators. Not all cataloguing educators are keen on the subject (Clark, 1993: 32). For various reasons work cannot be distributed according to "preferences" and educators who are not motivated towards cataloguing are assigned to teach it. Intner & Hill (1986: 41) also point out the practice in library school of encouraging deviation from cataloguing to other fields like online searching. Students are indoctrinated with negative preconceptions about cataloguing, passed on from their teachers. The diminishing interest is also sometimes the result of observation of cataloguing practices or the role models presented by cataloguers during their practicals (Intner & Hill, 1986: 55).

(d)   Poor cooperation between library educators and practitioners. Due to work pressure it is not always possible for practitioners to spend enough time to complement what has been taught in class by providing continuous assistance to new cataloguers. This deprives students of the opportunity to acquire more knowledge and skills for an actual job situation. This could be a good opportunity to dispel fears about the complexity of cataloguing and negative perceptions about the job.

(e)   Exaggerated priority given to technology and its implications. It was expected in the seventies that the introduction of technology would make cataloguers

redundant (Coetzee, 1995:156). It was also anticipated that cooperative catalogues would provide all bibliographic records for copy. This has not been the case anywhere in the world or in South African university libraries. Although a significant decrease in original cataloguing has been experienced, some libraries are still doing mostly original cataloguing although the situation is expected to change soon. Copy cataloguing is also still performed by professionals in most libraries.

A number of issues have to be addressed in the teaching of cataloguing in South African university library and information science schools. More will be expected in the future from new cataloguers with more responsibilities and an expanded range of tasks.

3.2.4 Possible changes needed in cataloguing education practices

Education has the responsibility to prepare students adequately for cataloguing jobs and also to create an interest in the job. Some possible solutions to the educational limitations are the following:

(a)   Design of the curriculum to reflect the current changes in cataloguing practice. There is increasing concern about the education for cataloguing and its ineffectiveness to respond to changes in the job (Buttlar & Du Mont, 1989: 5 & Romero, 1994: 211). Changes in cataloguing practice have brought with it the need for new knowledge and skills. Curricula vary from school to school. Education should however be grounded in solid theory and principles (Velluci, 1997: 4) to give students the background enabling them to think critically, to see the bigger picture, evaluate and make wise long-range decisions (Benaud, 1992: 87). Employers advertise predominantly for knowledge of basic cataloguing tools like AACR2, MARC21, DDC and LCSH for library and information jobs. It would be premature to abandon teaching them (Towsey, 1997: 79). South African library schools should maintain the teaching of these essential although traditional

51

subjects. It is important to teach the role of technology and other environmental factors in developing cataloguing theory (e.g. introduction of MARC). New subjects like programming systems, interpersonal skills and communication should be introduced (Steinhagen, 1997: 112).

A growing requirement has recently evolved, requiring that students be trained to be easily assimilated in cataloguing cooperatives and consortia. CALICO, a consortium of library and information centres around Cape Town, has indicated the need for students in librarianship to be trained for working in a sharing environment (Van der Walt, 1997: 88). This is highly necessary for students who will be doing cataloguing since cooperation in this field is vital. Standards are of great concern in a cooperative environment. A lack of standardization partly originates from the lack of adequate education in the application of bibliographic standards by tertiary institutions (both Universities and Technikons) (Coetzee, 1995:150).

(b)   Service orientation must be the main focus in teaching (Walbridge, 1991: 71). The interrelatedness of all library and information provision functions with user service should be emphasised in teaching. Attitudes should be built where the user is the important focus of all functions including cataloguing (Intner & Hill, 1986: 55). Cataloguing should be taught in a positive way, revealing its usefulness in the whole information provision process. Poor records lead to poor retrieval and thus failure in satisfying user needs.

(c)   Prioritising cataloguing knowledge and skills. Teaching of cataloguing should remain compulsory for every library and information worker as it is important for all professionals to have this background. The bibliographic record is the heart of all information provision work (Steinhagen & Maynahan, 1998: 5 & Walbridge, 1991: 62) and all libraries and information workers - whether they intend to take up cataloguing work or not - should have sufficient background knowledge of the structure of catalogues. Clark (1993: 33) and Jeng (1997: 79) indicate that some

52

library programmes in the United States do not require a course in cataloguing any more. Some South African programmes labelled as "information science" or "information studies" for example, also leave out cataloguing as a course. This practice promotes the attitude described by Buttlar & Garcha (1998: 319) where students do not want to take cataloguing because they claim not to see how it relates to the job they will be doing upon completion of the programme. Cataloguing is a core competency and should learned by all, with elective areas for specialization (Van Der Walt, 1997: 96 & Gorman, 1992: 694).

(d)   Balance between theory and practice. More time should be allocated for practical cataloguing as it is a skill mastered by practice and provides for the assimilation of practice and theory. Employment of students as assistants doing cataloguing is an effective tool that can help in the learning of the skill. Libraries should accept students for practical training as part of their normal, permanent activities.

(e)   More experienced cataloguers should participate in offering education. Henderson (1987:22) indicates the need for people to teach, who have enough experience. This will promote integration of theory and practice. Cataloguers should study to obtain further qualifications in order to offer education at graduate level (Clark, 1993 :33). Practitioners should be available to assist in cataloguing education whether full-time, part-time or as volunteers. They are in a better position to present both the classroom and real job situations. They also have experience of the changes and their implications on cataloguing practice. There is also the advantage that most of them might have developed a love for the job which they could pass on to the students. There is a need to increase interest in cataloguing. White (1987: 49) says the new breed of technical services professionals must take part in informing students that their preconceptions could be wrong.

3.4 Conclusion

Concerns are raised in the literature on the education and training of cataloguers. The two processes are very important in preparing for successful job performance but are presently not successful in this regard. It is necessary that educational institutions, employers and professional bodies cooperate in the education and training of cataloguers.

Education offers basic theoretical background information for library and information practice. Employers are then responsible for specific job situation training. The needs of the different job categories like new staff, experienced staff, copy cataloguers and original cataloguers, should be considered by employers, and training tailored specially to satisfy each one's special needs.

Chapter 4 : Training of cataloguers

4.1 Introduction

The education of cataloguers can not prepare students for all possible work situations. It can only provide a basis on which training for the specific work environment can be based. It is therefore essential that training must be done in all libraries, before entry level cataloguers can be expected to perform adequately.

4.2 Principles of training

Training is one of the management functions generally presumed to be taking place in every work situation because of its basic importance. The responsibility to train is acceptable to all the parties affected, the employer and the employees. All employers can claim to offer job related training. In practice however, this is not always faithfully and effectively pursued (Trainer, 1989: 367). The definition of training should be based on principles. Adherence to established training principles and techniques will help to make training successful.

Training is related to all other aspects of organizational functioning. In a library environment it can be viewed as a subsystem of the total library management system. It is also related to all other human resource management functions (subsystems) like recruitment and selection. Failure of training will result in breaking of the management system and affect its success.

4.2.1 Effectiveness of training

The questions that can be asked are how effective is the training that is being offered in the various job situations? Are principles and techniques of training known and applied? Is there any way of critically analysing the training function and how it benefits the

individual employee and their organizations? Leigh (1991: 18) defines effectiveness as "doing right things well".

There is also a need to continuously check on the relevance of the training to satisfy the present and future needs because of the changes and developments in various jobs. Literature indicates that the practice of training is more difficult than it is considered to be (Creth, 1986: 12 & Baldwin, Gibbs and Slough, 1997: 267). This means that on careful analysis most training practices may not pass the effectiveness test. Purposeful training will entail proper planning, conducting and follow up until results are obtained.

4.2.2 The need for training

Training becomes more necessary as jobs become more complex. The challenge of computerisation improves a way of executing tasks whilst at the same time complicating jobs (Steinhagen & Moynahan, 1998: 3). At the same time as training becomes a necessity, resources to undertake better training are being cut. Training then becomes very expensive in terms of staff to do the training and financial resources. Proper accountability is of critical importance in such situations of scarce resources. Results of training have to be seen to be adding value to the job performance. Training should be seen to be results oriented. It must be thoughtfully established to achieve its intended purpose (Rothwell, 1994: 11). It is related to the goals of the organisation and should be seen to be working towards them.

4.2.3 Kinds of training

The kind of training pursued in this work is that which fosters improvement in both job performance and individual development (Jerling, 1996: 3). There is an interaction between the two aspects. Both the aspects of training and development as indicated when the concepts were defined, are regarded as important and interrelated. This is because it is only an employee that is well trained and continuously developing as

56

an individual who can be an effective performer on the job. The two pronged (training and development) nature of training discussed here reveal its important characteristics.

4.2.4 Training and development

Training is traditionally regarded as being concerned with knowledge and skills acquisition for the present job. It was viewed separately from development. Development of the employee refers to learning opportunities designed to help individuals grow and be prepared for the future (Harvey & Bowin, 1996: 157). According to Jerling (1996: 18) these opportunities are not limited merely to improving employees' performance in their current job but it enriches both the individual, the group and the organization. This study also looks at training as meant for the present and future of both the individual and the organization. Training is not a solution to all the performance problems but is an effective tool to foster improved job performance and individual development. Multi-skilling and flexibility which are very important in the current changing cataloguing environment can be achieved through this broad kind of training.

4.2.5 Benefits of training

It is important to indicate the benefits that proper training will have for the individual employee and the employer. An understanding of the benefits can foster commitment to training. Continual investment of resources in training will be justified by weighing the cost of the resources compared with its benefits. Lack of training can be very costly in a sense that the organization needs well trained staff to continue to survive and achieve its planned goals. Beach as cited in (Gerber, Nel & Van Dyk, 1987: 229) and Armstrong (1996: 529) supports the following as the major benefits of training:

(a)   Improved service. This benefit can be achieved in terms of high production rates, quality boost and general satisfaction of the clients. The need for quality control in

4.3 The status of training in South African university libraries

The present status of training in South African university libraries cannot be considered to be a total success. Research by Agostinho (1990) revealed that no adequate policies exist and insufficient fund allocation is a problem faced by trainers in South African university libraries. The situation can be described as that of lack of commitment to training. It is also partly a result of various related factors to be discussed in this section. The status of training will be looked at against the generally acceptable standards of training to be discussed later in this chapter.

4.3.1 Reasons for non-commitment to training

Libraries, like many other organizations have to train their employees to attain the skills they require on the job and maintain their effectiveness. Differences between individual libraries also makes it necessary that knowledge and skill specific to the situation be imparted. Despite this acknowledgement of the responsibility to train by libraries, there is evidence of lack of commitment in practice (Lombard, 1997: 16). Lack of commitment to training and development can be noticed by its unorganized nature, the poor level of support it receives, and no setting up of clear policies.

There are various reasons for poor training practice in university libraries. These reasons do not apply to all situations. Lack of enthusiasm about training is often largely because of lack of visible results caused by the fact that it is not offered properly addressing the needs at a proper time, and with proper techniques. This situation results in what Lipow &Carver (1992: 63) refers to as "transfer failure" which is a situation where training does not bring forth the desired results. The failure to bring forth expected results makes training to loose credibility. Training is thus viewed as a waste of time and money.

4.3.2 Factors inhibiting proper training

Proper training is inhibited from taking place by a number of other factors some of which have been carefully researched by training experts, amongst others Creth (1986: 10).

(a)   Management sometimes adopt the attitude towards employees as production mechanisms, with no interest in their development, often leading to poor training practice. Workers in turn develop an "instrumental attitude" towards work as a means to improve their lives (remuneration) and do not care on whether it is interesting or not, nor about the implications of their work. Priority is attached to production and job satisfaction is lacking.

(b)   Management relies on outside labour markets to satisfy the need of the organization for relevant skills at all levels.

(c)   Reliance on poaching of employees from other employers instead of developing their own staff. This practice is opted for instead of developing own staff for higher positions of more responsibilities or preparing them for perceived changes.

(d)   According to Creth (1986: 10), there is preference for trouble shooting problem solving approach to management rather than on a preventive, planned basis. This is viewed as a reactionary attitude where problems are only addressed as they surface rather than a visionary attitude to problem solving. Training as preparatory function for the future receives no priority.

(e)   Promotion of staff to other positions, resignations, Losing of trained staff as a result of poaching by other employers, can be potential threats to proper investment in training. No institution wants to turn into a training institute for others whilst it expects its trained staff to add value to its own operations.

(f)   Individual factors can also play a role in failure of training and the reluctance to pursue it. Some individuals resist change (Creth, 1986: 7 & Walbridge, 1991: 69) and any training that is change oriented is not welcomed. Burnt-out staff may view training with less interest as they do not expect to gain any knowledge and skill that will interest and benefit them. Despite management's effort to train, staff usually shows no interest.

Poor training practice is also evident in libraries. Cataloguers are often judged by the quantity of the work they produce (White, 1987: 48), which makes them likely to be viewed as production mechanisms. The problem with this attitude is that employees also tend not to attach meaning to what they do but only care to meet employer's targets. Standards are compromised in such situations. Employees also develop mechanisms of defence to account for their poor performance. Cataloguing duties are narrowly labelled as technical constituting of routine duties that may not necessitate any further training (Thomas, 1997: 6). Another fact that might promote reluctance to invest in cataloguer training is the notion that cataloguing is a dying art (Gorman, 1992: 695) so no need to waste resources on improving its training.

4.4   Learning principles applicable to training

Learning is expected to take place with the application of training. Learning takes place when "something not previously known is known or something which could not be done can be done" (Blanksby, 1988: 25). There are many theories on which the history of the practice of training is based. Researches has indicated that there are several learning principles which have to be considered and incorporated during training (Cascio, 1995: 246). These include the psychological aspects of training as it deals with human beings, both the trainer and the trainee. Failure to recognise the importance of these principles often leads to the failure of training. The trainer and the learner in a cataloguing environment are adults and principles relevant for the adult learner are considered relevant for this work.

The subjects of this study are adults, both trainers and trainees. The training of adults has been proved to present challenges which differ from those of children. This is important in the training of cataloguers because they are adults characterised by different learning patterns.

The following adult learning principles are listed by Van Dyk, Nel, & Roedolff (1997: 213):

– The need to know. Adults need to understand the why of everything they should do. They will need to understand why they need to undergo training and how they are going to benefit from it.

– Concept of the learner. Adults are self directing and independent. They can determine their own training needs. According to Callahan (1995: 378) adult learners value training that reflects trust, respect and concern for them. They should be respected and recognised in needs determination. This attribute makes learning effective since it is not imposed but based on self-realised needs.

– The role of the learner's experience. Adults have a tendency to make use of their previous experience. In a training environment additional information builds on what is gained through experience. The experience can be useful as a source in learning, e.g. it can be used to facilitate discussions which ultimately enforce learning. The trainer also has to acknowledge the past experience in his methodology to avoid boredom and resistance.

– Readiness to learn. Adults are ready to learn when the need to do so is experienced. Learning should be related to their needs and situation. It must be relevant to them.

– Orientation to learning. Activities are life or task-centered. Adults learn for a purpose and learning is most effective if related to real-life situations.

– Motivation to learn. The motivation to learn for the adult is largely intrinsic. Learning is internally borne due to the motivation and thus there is a tendency to be persistent.

– Authority relationships. Adults are self-dependent and self-responsible. The adult can decide when he wants to continue learning, where he will study and nature of subjects, etc. The adult resists imposed situations where he considers his authority to be ignored.

– Responsibility. The adult is co-responsible. Adults want to take responsibility for themselves and their learning. They are not totally dependent on the trainer. They need to feel that they personally control what happens to them (Rubin, 1991: 89).

Working with individuals some of whom are already used to some form of pattern and work and tools needs special attention and accommodation of individual learning styles (Epple, Gardener & Warwick, 1992: 87). Training must be designed in a flexible way.

The applicability of these principles will be looked into when the design of the training model is discussed. Throughout the training process from the initial to the concluding stage the designer has to bear in mind that he or she is dealing with adults.

4.5 Approaches to training

Training can take two basic forms, On-the-job or off-the-job training based on where the training takes place. A variety of methods can be used in both approaches. Methods are ways in which learning is transmitted. New methods also keep on appearing such as those based on technology (Botes, 1993: vi), e.g. use of multimedia technology.

4.5.1 On-the-job training

Most training takes place on the job. Training takes place mostly in the presence of the supervisor or more experienced staff (Rubin, 1991: 92). Various methods or techniques can be used on the job. Literature indicates an inclination to think of on-the-job training as one-to-one training only. This is a limited perception that could result in limitations to the scope of training offered. This kind of training is usually done in an unstructured way with no proper preplanning (Rothwell, 1994: 1). Existing on-the-job training practices can be improved by proper structuring to yield better results. On-the-job training has the advantage of being cost-effective as locally available resources are employed. Learning and doing can also take place concurrently. There are a variety of optional methods that can be used for on-the-job training to promote its effectiveness.

The following methods can be used for this kind of training:

(a)   **Demonstrations** - The trainer explains specific procedures, equipment and routines by demonstrating how a task is carried out. The trainee is shown what to do by the experienced staff member. The disadvantage is that the experienced member of staff may have the difficulty explaining things to the trainee (Intner & Hill, 1986: 309). This method does not provide for the creation of structure in the learning process, neither does it provide appropriate feedback which is required to improve effective performance (McKenna & Beech, 1995: 166)

(b)   **Lectures** - can be used to present background information, technical knowledge and procedures. This method may be used from the induction stage especially if more than one people are trained at a time. Its disadvantage is that it allows little audience participation which is desirable when dealing with adults.

(c) **Discussion** - can be structured or unstructured. The trainer determines the focus and course of the discussion. Participants can bring up ideas which they gathered during their studies or past experiences.

(d) **Programmed instruction** - this is good for providing information to trainees in small segments and allows to check progress. It is useful after completion of the induction to instruct on the actual job. The method could include the use of training manuals assigned to trainees to consult as they continue to learn. Effective training manuals can also be designed internally with contributions of all staff. Discussion of common problems encountered by staff and possible solutions can be noted and compiled into an effective manual. This facilitates learning at one's own pace and saves on trainers' time as he is not always directly involved. It also provide backup training.

(e) **Simulation methods** (e.g. case study, role play) - These methods allow the gaining of first hand experience through imitation. Case study involves use of a well documented description of a real life situation to learn how problems can be solved. Role play depicts real life situations the trainee is likely to encounter. Problem solving techniques are learned through these methods.

(f) **Mentoring** - Inexperienced employees are formally assigned to experienced ones to help them to develop job skills. The mentor offers advice, guidance, support, acts as role model and does counselling (Nankivell & Schoolbred, 1997: 3). This method is effective in preparation for more responsible job positions. The method can be subjective if not properly structured because employees may not receive fair treatment.

(g) **Literature circulation** - It involves rotation of books, journals or journal articles or any information relevant to the job. This also serves as a way of encouraging professional reading.

(h)   **Research** - Staff can be assigned topics related to their duties. This method is a good tool for continuing training since staff can acquire in-depth knowledge on the subjects they are researching. This method can also be useful to prepare for envisaged change or developments likely to affect their work.

(i)   **Job exchanges** - job exchanges sometimes termed job rotation can be useful in allowing staff to gain experience in different operational areas. It can promote cooperation as staff will learn how their jobs are related to others.

(j)   **Regular staff meetings** - Staff meetings can serve as a platform where common work problems can be shared and solutions sought together. Working manuals can be designed accordingly.

(k)   **Projects and tasks assignment** - Staff are given work to provide experience of planning and implementation of a defined task and also learn to work with others (Blanksby, 1988: 280.

(l)   **Technology assisted training** - Training can be offered through prepacked training tools in the form of videos and computer software. The training packages can be used by individuals or groups of employees in their own time. The training is easily repeatable and cost effective. . Teleconferencing is another type of technology assisted training devices (Moss, 1993: vi). The methods should never be used without proper checking of suitability to the specific situation

No single method can suffice as a training tool. A variety of methods have to be tried out and used in relation to the perceived need of training. Proper planning can help to improve on-the-job training by using methods to complement one another and cover a wider scope of information to be imparted.

4.5.2 Off-the-job training

Off-the-job training takes place outside the normal working environment. This might be in the same organization but in some specially reserved premises or even away from the organization. Availability of financial resource and willingness to release staff plays a major role. Off-the-job techniques can help meet both organizational and personal goals. Most of the methods used on the job can also be used off the job. Other possible off-the-job training and development opportunities can be used as well. Trainers have to be familiar with all these methods so that they can be used when necessary.

The following methods can be used for this kind of training:

(a)   **Simulation methods** - The various simulation methods has already been discussed. They can be used effectively away from the job setting.

(b)   **Secondments** - Secondment of staff to other libraries will help staff to experience working in a different environment and learning new skills not practised in their jobs. The method is familiar for broadening job experience.

(c)   **Visits** - Visits to other library and information centres can help trainees gain a wider view of how their work can be performed even outside the local limitations. Exchange of ideas on job performance can also take place during the visits.

(d)   **Open learning** - open learning texts and courses enable people to study at their own pace.

(e)   **Further education/career development** - The actions employees take in their career progression. These methods should be encouraged by management who believes in preparing their people for future more responsible positions. According to Harrison (1997: 180) citing Williams "There needs therefore, to be a shift away from advancement oriented view of careers, and an increased emphasis

on career development at the same organizational level or within the present job". The method has a potential to stimulate and regenerate old staff.

(f)   **Interest groups** - This will encourage more meetings even for people in the lower positions to communicate with colleagues. It is an advantage that cooperation and the consortia among the different libraries in the country has encouraged these types of meetings.

(g)   **Professional contributions** - Staff should play an active role in professional bodies and activities. This help to give a wider professional outlook.

(h)   **Experimentation** - Trainees receives guidelines about what to do and are allowed to continue on their own. Trainees have a chance to test validity of the information they received by checking if the desired results are met.

(i)   **Conferences, seminars, workshop, courses and meetings** - This is one way of keeping abreast of developments. Limitations of finances and time play a role but efforts should be taken to encourage attendance. The trainee who attend should give a report about the training to colleagues who could not attend (Lipow & Carver, 1992: 71). Second hand information which is supposed to be taken back or reports and transfer of knowledge however cannot substitute personal participation. The prevalent situation among cataloguers is that most cataloguers do not get a reasonable chance to attend these meetings. They lose the feel of meeting other colleagues from different situations to talk to them and discuss common problems and frustrations.

Coutts (1991: 17) advises that methods which instil a wider professional perspective should be considered. This is relevant for the current situation in our country. Professional literature, participation in committees, working parties and professional associations, attending meetings and conferences; and visiting other libraries are very important in broadening knowledge. Operation in isolation should be completely

discouraged especially because of the uneven levels of development and disparities in resources available at the different universities in the country. A great need exists to share and learn from one another. Cooperative training where concerned institutions share the responsibility and resources for training should also be encouraged.

4.6 Models that can be used for an effective training programme

Training has to be well organised if it has to be effective. Leigh (1991: 18) defines effectiveness as "doing right things well". Good planning and implementation of training have to take place in order to bring desired results. It is clear from literature and personal observation that although some training takes place, it is not in a systematic way that can bring desired results. Botes (1994: 132) states three different ways in which training can be done:

- training by trial and error
- unsystematic and unplanned training
- purposeful and well planned training.

The last form of training is the only reliable one for acceptable results. Well planned training will result in a form of a programme to guide its operations. The aim is not to suggest a rigid structure but to have a framework that will guide training practice. The model envisaged in this study is one characterised mainly by:

- Well planned structure. Have a plan that culminates in production of a programme to serve a guiding framework.

- Continuity. Have an element of continuing throughout the period of employees' employment.

–   Flexibility. Be flexible to accommodate the needs of various individuals at different times and be responsive to new developments.

4.6.1 Advantages of a well planned training programme

Conroy (1973: 4) defines planning as a process in which the present situation is carefully examined and preparation is made for changing that situation. A plan is worked out to achieve a specific purpose and to direct the course of events. A training programme is also meant to direct the success of the training process. A well planned programme can be distinguished by several important characteristics.

–   It is not controlled by the forces of events. Training and development needs are identified in a structured manner (Castelyn & Webb, 1993:140)

–   It will be possible to modify easily and update what has already been developed for the same position when subsequent training is required

–   Present needs and future plans can be accommodated

–   It can be correctly placed in context
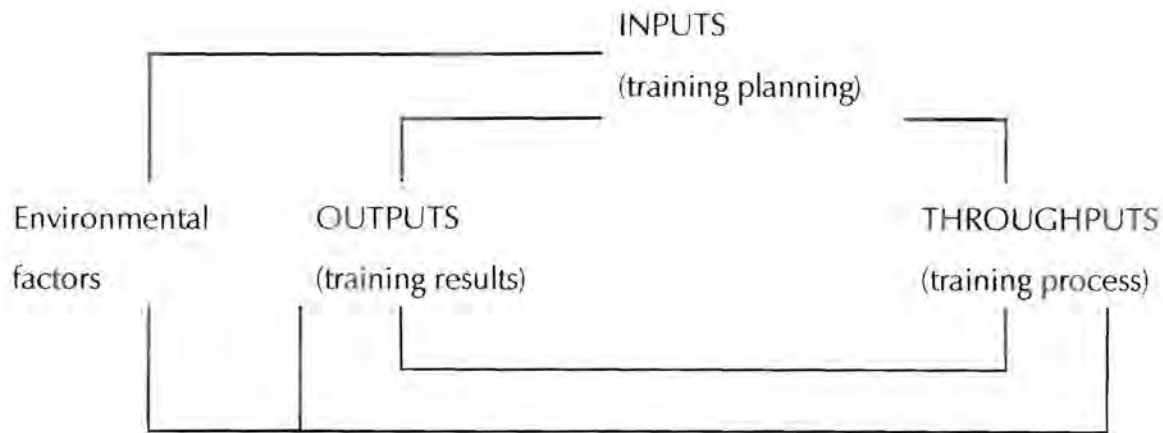
4.6.2 The system approach to training

Universities usually have training departments responsible for most needs of their human resources. There can however be special training programmes for specific units or departments concentrating on the specific needs of that unit. Such programmes comply with the parameters of the goals of the parent institution. Both broad and individual programmes should complement each other. Training is thus regarded as a subsystem of the whole university operation and also of the specific departmental system. The system

71

approach is preferred to indicate all related situational factors that shape the training that takes place.

A system can be defined as a network of interrelated components (Cascio, 1995: 48). According to Buckley & Caple (1995: 26) a systems approach to training can mean that training is a subsystem interacting with other subsystems upon which an organization depends for its progress and survival. Within a university library training is a subsystem of the total human resource system. The system theory argues that for every system to function normally there must be inputs, throughputs and outputs (Gerber, et al., 1987: 126-127) (see figure 1). The institutional setting and environment also determine the success of training. This implies that training is an open system which is interrelated with its environment (Werther & Davis, 1996: 20). The environment must be supportive. Environmental factors include factors like technology, time, finance, opportunities etc.

The second meaning of a systems approach to training is that there is a logical relationship between sequential stages in the process of training (Buckley & Caple, 1995: 26). The training process itself is also a system in that all components that constitute an effective training practice must be thoroughly executed. There should be interaction within the components of training and also between training and other components of the human resource system, library system and the larger university system. The success of training will be affected by factors from within the training system itself and from outside factors from the larger system. A training system model based on models by Gerber, et al. (1987: 126-127) and Osborne (1996: 43) is given below.

Figure 1:   Training system model

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                                    INPUTS
                               (training planning)

   Environmental        OUTPUTS                      THROUGHPUTS
   factors           (training results)            (training process)
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Inputs include needs and resources, throughputs involve selection and management of resources whilst outputs are the goals or ends (Osborne, 1996: 40). The system approach suggests that all parts are important and interrelated and none should be overlooked. One characteristic of a system is the cycle of events - one aspect taking place after another in a repetitive order (Botes, 1994: 2).

4.6.3 Steps in the training process

There are a number of factors which should be carefully considered when planning and implementing an effective training programme. These are reflected in a variety of training existing programme models.

These factors are clearly depicted in a training design model by Goldstein as discussed by Jerling (1996: 363) and Kirkpatrick (1994: 3). The process consists of needs determination, objectives setting, course content, selecting participants, scheduling, selecting facilities, selecting instructors, aids, programme coordination, and evaluation. All these elements constitute the training system. The steps of training takes place in a circular fashion from needs determination to evaluation and back to the initial stage again repeating themselves.

4.6.3.1   *Needs determination*

The process of needs determination is the first step in the planning of a training programme (Jurow, 1992: 8). Every training programme must be based on correctly researched needs for it to be successful. Needs may also change with time due to constantly changing job situations. This suggests that the process of need determination has to be reviewed form time to time. Involvement and cooperation of the people who are supposed to attend the training will prove to be fruitful in the determination of needs. There must be inputs from everyone (Callahan, 1995: 378)This will be in accordance with the adult learning principles already discussed.

Osborne (1996: 64)indicates a number of areas on which training can be focused and from these three categories of needs were identified: organizational needs, group needs and individual needs. Organizational needs may be linked to vision of the organization and change in strategies. Group needs may be linked to factors like change in operations (which may necessitate whole staff training). Individual needs may arise from the characteristics of the job and job related interest. Needs may be tasks specific or broad based (Castelyn & Webb, 1993: 155). They can also be categorised as short term (for immediate job execution) or long term (focussed on the future), (Hirshon, 1991: 54). All needs categories have to be accommodated and addressed by a training programme. All jobs comprise three broad components: skills, knowledge and attitudes (Harrison, 1997: 254).

The gap between performance and goals is seen as an opportunity for development (Sullivan, 1992: 8). The existing problem of failure to catalogue to acceptable standards suggests the need for training and development. The needs of cataloguers in the new roles are undeniably increasingly multi-skilling and management oriented. It is important that the skills and competencies required in this field must be sufficiently researched and met through training.

Various techniques can be used to determine needs: job descriptions, interviews, questionnaires, personal observation and discussion with staff and management (Revill, 1987: 54). Training has to be work related and needs directed (Lombard, 1997: 15)

4.6.3.2   *Setting training objectives*

As already indicated, training forms a part (subsystem) of the library system, its objectives must be related to the objectives of the library. Objectives are meant to state the desired behaviour and conditions under which training is to occur (Werther & Davis, 1996: 288). They also help measure the success of training at the end of the process. Training objectives also guide the trainee to have a specific understanding of the whole training process and its benefits.

The following can be considered as objectives of a training programme as discussed by Botes (1994: 130) and Castelyn & Webb (1993: 176):

(a)   To develop a range of skills in employees and their successful practical application

(b)   To increase productivity

(c)   To promote morale and enthusiasm of staff

(d)   To promote awareness of current events related to the job.

(e)   Professional development of staff to exercise professional judgement

(f)   To develop a broad perspective of outlook towards the job in order to promote flexibility and future orientation.

(g)   To equip trainees with knowledge and skills in preparation for senior position or manage rial roles.

Objectives of a specific programme are to be established guided by what the programme is aiming at.

4.6.3.3 Course content

Course content will be guided by the needs and objectives of the programme. Other factors like target trainees will also guide content design. The course content will also determine the methods of training to be used. The content should be comprehensive and easy to understand. Knowledge of the aspects to train on is important in content design.

4.6.3.4 Selection of participants

Choosing of trainees and trainers should be done with great care as the human factor is the centre of the training practice. It should be determined who can benefit from training, whether training should be voluntary or compulsory and grouping of participants (Kirkpatrick, 1994: 11).

Every cataloguer is a potential trainee. Care has to be taken that only relevant people should attend various training sessions. This process needs control based on the determined needs.

4.6.3.5 Scheduling of the training process

Scheduling is one of the critical factors in a work environment. It involves the preparation of a list of staff and their training needs with an indication of allocation of staff, date and time and location for training (Creth, 1986: 70). Training does not take place in a vacuum but has to be conducted within the confines of time available to do work and cater for additional things. The management of workstations involved has to be aware and involved in the scheduling of training to avoid conflict of interests.

Most of the time cataloguers are hard pressed with large quantities of work to be processed and there is very little time available to accommodate other issues despite how

essential they may appear to be. Cataloguers hardly have time consult their cataloguing tools and this can lead to high error rates and poor bibliographic standards.

4.6.3.6 *Facilities needed for training*

An environment suitable for learning to take place is an important consideration in the choice of training facilities. This is usually ignored especially in on-the-job training. A lot of negative factors interfere with the training process. Things like space shortages, noise, telephone interruptions or any thing that may cause disruptions must be avoided. This sometimes suggests moving to a secluded training room or space which is usually difficult due to space shortages. Facilities chosen will be guided by the kind of training to be offered.

4.6.3.7 *Appointing instructors*

Training is usually left to the immediate supervisors, especially with training of new employees. It is never established if these trainers have the qualities required of a trainer. No effort is usually made either to help the trainers acquire the necessary expertise. No special status is assigned to them as trainers which is a disadvantage since they have to fit the training in, among many others that they do. Creth (1986: 41) says any staff member who plays a significant part in training should be viewed as a trainer. This view will improve the recognition of the present trainers and review on whether they qualify to do the work or not.

The present practice in cataloguing is that senior or experienced cataloguers who are viewed as being more knowledgeable in cataloguing are assigned to training. The head of cataloguing usually bears the responsibility and delegates where possible. Training does not receive top priority treatment in such cases.

Conroy (1973: 11) and Creth (1986: 42) specify the following qualities that are considered to be important for a trainer is:

- Familiarity with the subject matter
- Possession of a positive attitude towards work and training
- Possession of training skills
- Interest to train. A person who likes what she is doing can be good at stimulation of interest
- Openness to new ideas and suggestions
- Commitment to continuous training: Answering queries, offering advice and counselling whenever necessary.

4.6.3.8   Training aids

The function of training aids is to assist in the effective delivery of information. Audiovisual material, flip charts, overhead projectors, manuals, textbooks, case studies, computer software etc, can be used Aids chosen should be suitable for the content and method of training. Aids should be clear and understandable. They should be carefully chosen to suit the kind of training to take place.

4.6.3.9   Coordinating and conducting training

The training process needs careful coordination and proper way of conducting to be successful. Coordination facilitates smooth running by putting everything in proper relation to each other (e.g. trainees, facilities, breaks etc.).

Proper conducting of training involves knowledge and skill in how to convey content (e.g. use of correct training methods for different lessons), effective presentation (e.g. put trainee at ease and stimulate interest), and consideration of individual learning abilities and problems.

Sequencing of activities also need to be carefully planned. The sequence of activities should build steadily towards achievement of programme objectives (Conroy, 1973: 13). Training should build up from the simple to the complex to facilitate understanding.

4.6.3.10   *Evaluation of training*

Evaluation is necessary to measure the returns on the investment in training (Lunn, 1992: 155). Training is an expensive exercise and needs to be justified for its funding to continue, especially where financial resources are scarce. All forms of training have to be evaluated. There generally has not been evaluation of on-the-job training. Off-the-job training is usually limited to reports by those who attended such training. Well structured training will be easier to evaluate than unstructured training.

Two possible kinds of evaluation are possible - programme evaluation and outcome evaluation. The Kirkpatrick method developed in 1959 indicates the four levels of training evaluation (Zielinski, 1996: 4). These levels are highly recommended in training literature and sufficiently cover evaluation of all relevant aspects.

(a)   Reaction - establish trainees' reactions to the course.
(b)   Learning - test what trainees learned from the training they attended.
(c)   Behaviour - check on behaviour change on the job.
(d)   Results - check if the change improve on organizational performance.

Evaluation can take place by use of several methods like, questionnaires, tests and appraisal (Castelyn & Webb, 1993: 157). Line managers and trainees can mutually assess training undergone in terms of performance and employee development. Collected information must be clearly reported. All parties benefit from relevant training.

Evaluation needs to be presented positively to the participants. It should be understood to be contributing to improvement of both employees and the organization with no

79

hidden intentions. Training needs changes with time and are influenced by changes within the organization. Programmes also need to be changed or developed to improve them or change when need be. New techniques of teaching can be incorporated. According to Duchin (1997: 42) the golden rule of training is train, evaluate and retrain.

4.7   Training requirements of different groups of cataloguers

There are significant factors relating to cataloguing practice that have to be considered in the training of cataloguers. Training does not take place in a vacuum.

Training for cataloguers has to take the various levels within the cataloguing practice into consideration (Intner & Hill, 1986: 370). These levels are described in terms of experience and the type of job done. Staff can be grouped as "new" or "experienced". Dockel (1996: 114) and Creth (1986: 17) categorise the levels of training as basic for inexperienced or new staff and continuing education. Training can also be according to type of work such as original and copy cataloguing. Training is equally important to all levels of cataloguing staff. The unique needs of staff members cause them to respond well to different types of training.

4.7.1   New staff

Trainer (1989: 371) indicates that adequate training for the professional cataloguing staff constitutes of two components: laying the basic foundation for cataloguing work and assuring that cataloguers' skills continue to grow.

Literature indicates that the basic foundations of cataloguing are still prerequisites for employment in cataloguing jobs. Basic knowledge of AACR2 rules, classification and subject cataloguing are regarded as essential (Hill, 1997: 81). Libraries in South Africa and elsewhere in the world have had problems hiring for cataloguing positions, because candidates have little or no experience in cataloguing either because they are fresh from

school and have no practical job experience. They usually bring too little experience gained only during practical work done to satisfy degree requirements. The responsibility to train these cataloguers remains with the employing library.

The training of new staff is considered a critical time in which the foundation is laid and the future of the cataloguer is determined (Intner & Hill,1989: 351). Initial job training is usually conducted at this time, to produce a cataloguer who can work independently, and who knows exactly what the work of a cataloguer is (Intner & Hill, 1989: 354). The best training takes place during this time when the employee is still very eager and ready to learn.

Good work attitudes can be fostered during this time. This is the time where cataloguers must acquire a sense of accountability for their work, and the far reaching impact their work may have on information provision. This broad perspective is often lacking among cataloguers. This is sometimes reflected in the careless attitude adopted especially when it is known that the work will be going through a quality control stage. Decision making skills are often lost at this stage. This is unfortunately also the time when bad job practices can be acquired through imitation. Often the employer is faced with the pressing need to train and have a functional cataloguer on the job as quickly as possible (Intner & Hill, 1989: 346). Most essential aspects are then left out during hasty training.

After initial training has taken place, there is often a tendency to decrease the intensity of training, thinking that the training is complete. Both trainer and trainee want to engage in the immediate challenges of their work as soon as possible (Coutts, 1991: 19). Training should lead from initial job training to continuous training because of the need to keep up with development.

4.7.2 Experienced staff

It is no longer possible for cataloguers to survive in their job without continuing training. There sometimes is a need to retrain cataloguers in the basics of cataloguing. Skills can deteriorate and become obsolete (Robbins, 1997: 272). Sometimes there is a need to update knowledge and skills. New formats and continuous changes in task operation necessitate continuous revision and acquisition of knowledge and skills.

Experienced staff need to continue to adhere to acceptable standards of practice. When general performance problems are experienced, retraining can be a solution (Creth, 1986: 20). There is need to interpret change continuously and train in new skills. The interests of existing staff will be more diverse and the needs will be more individual (Revill, 1987: 36). Career planning can be used to improve the effectiveness of existing staff (Jurow, 1992 : 8). Cataloguers can develop their careers or themselves in many ways. Nankivell & Schoolbred (1997: 2) says "development of individuals' careers can take many forms beyond traditional promotion to a higher grade within the same field."

The introduction of technology showed that a lack of proper training made it difficult for some experienced staff to adapt to technology use. Cataloguers who are very well versed in the rules and principles of cataloguing cannot be fully functional in the new environment. Their promotion to the management of the cataloguing process is also affected, because the management of technology is also involved. The situation could have been circumvented by well-planned training.

4.7.3 Staff doing original and copy cataloguing

Training in cataloguing can also be done for two levels of staff, namely copy cataloguers and original cataloguers, depending on whether the two functions are handled by different members of staff. The practice in most university libraries in South Africa is that the two duties are handled by the same cataloguer, who happens to be professional. This

study concentrates on the professional level. The basic foundation for the training of staff will be the same since all cataloguing functions are based on similar cataloguing theory, principles, and procedures.

Copy cataloguing is considered to be routine, since most of the records are copied from existing ones with little or no alteration. It is however not completely routine, because sometimes the copy need to be scrutinized or substantially changed (Hill, 1988: 96). Problems with existing records on cooperative catalogues have to be identified and recommendations for the amendment of some records have to be made, if the corrections cannot be made locally. Although local deviations are not advisable in a cooperative environment, they cannot be avoided entirely in some instances (Steinhagen & Moynahan, 1998: 8). In some cases they are prompted by the need to accommodate the library's local special needs of patrons (Bowen, 1998: 76). Decisions have to be backed by sufficient knowledge of cataloguing. Proper training in the basics of cataloguing is necessary. This can be done easily by properly trained nonprofessional staff with professionals supervising.

Original cataloguers may however need even more intensified training as they have to create records from scratch. A lot of decision making is necessary in the application of theory to the practice of cataloguing. Cataloguers have to be proficient in extracting important information from the records and have the knowledge and skills to use all other tools that can assist in additional information provision. Problem solving skills are required when dealing with records of unfamiliar structure or media of publication.

4.8   Conclusion

Library managers have to show full commitment to training. An official training policy should be set up to show commitment and ensure support by management. The policy should be well publicised to the employees and more resources (e.g. money, staff, time) be made available. Good planning of training should take place. A well planned but

flexible training programme offers many advantages towards effective employee training. The principles and techniques established in general training theory should form the basis for every training programme.

The emphasis on development indicated in the introduction, challenges libraries to shift emphasis in that direction and improve on existing training programmes wherever they are found to be lacking. Checklists should be drawn to ensure that all of the required steps are included in every training process.

Trainers should also be fully committed to their job to produce the best training programmes possible with the little resources available. Continuous research should be done to find new and better improved methods and opportunities for training. Trainers should exercise the principle of doing much with little in the face of genuine resource scarcity.

Another challenge facing trainers is the current changes in job structures and roles. Some people may find new roles as imposed and thus not react positively even to training. Training must accommodate such unique cases and be flexible to their needs. Common problems like limited funds, staff, time and the impossibility of establishing a training unit can be overcome by proper training planning.

The individual cataloguer will function best if he or she understands the overall system and the context in which she is operating (Intner & Hill, 1989: 345).

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
TOTALS	**120**

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
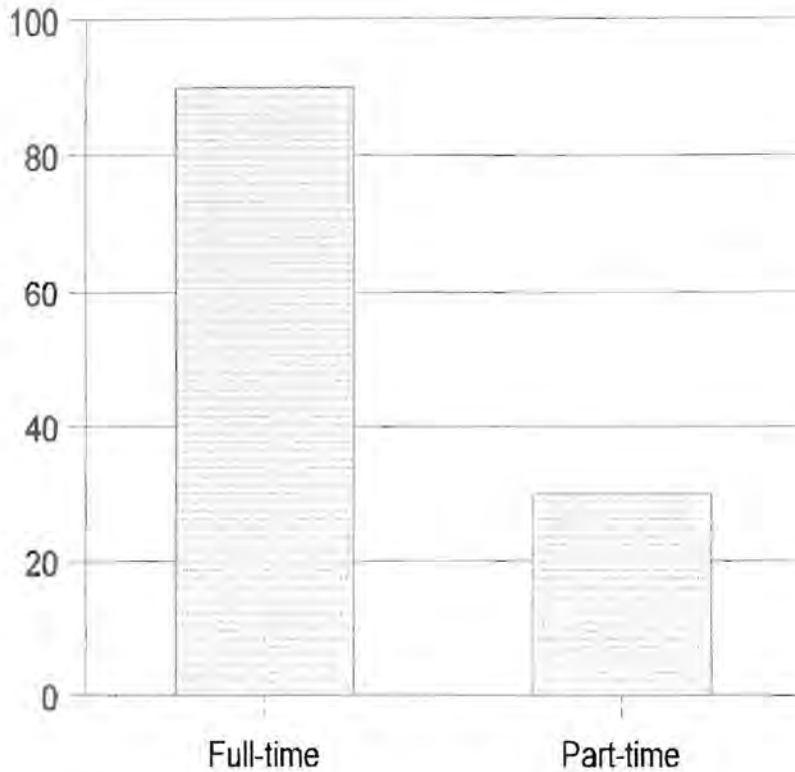
By far the most staff members are full-time cataloguers (75%), showing that in academic libraries at least, cataloguers are still regarded as important. Some cataloguers may work part-time as result of the decentralization of cataloguing, where they also have to perform other duties apart from cataloguing. 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**
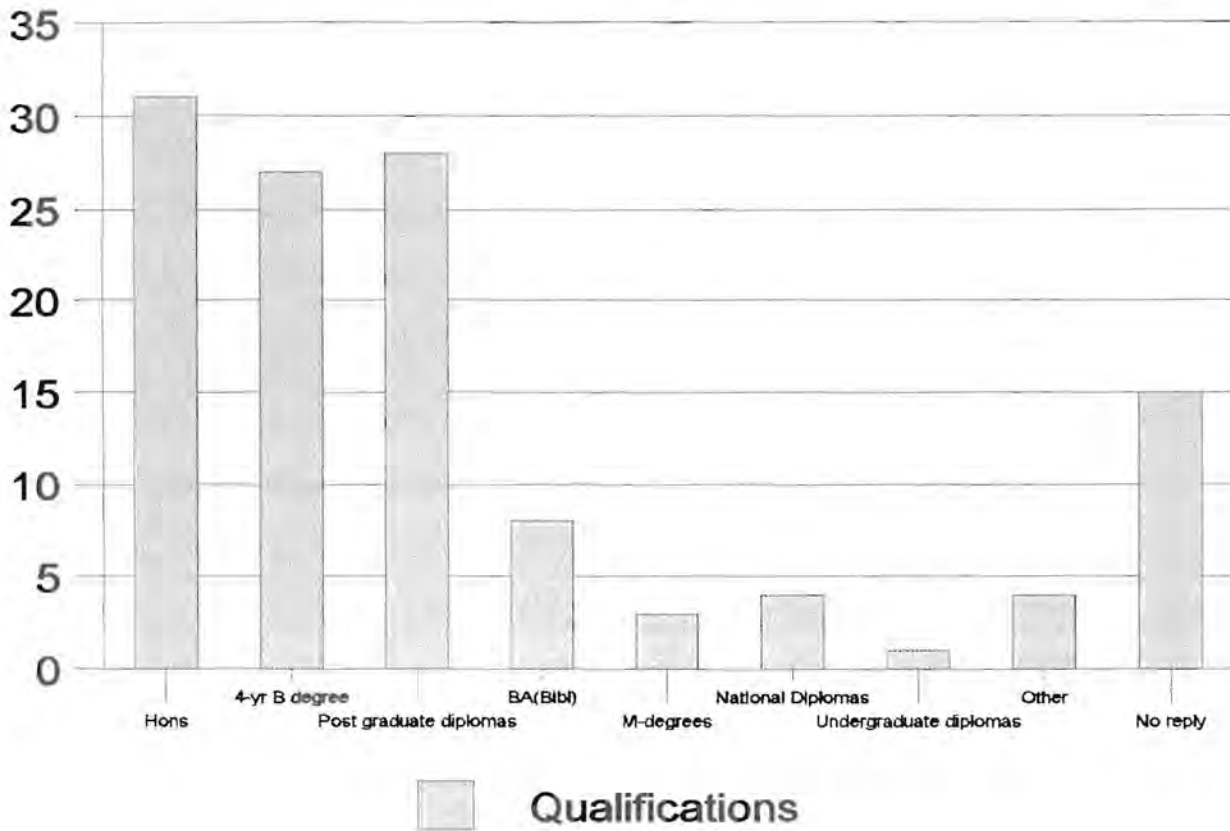
The findings show an amazing number of highly qualified cataloguing staff, mostly graduates. It is clear that cataloguing is still a professional job in South African university libraries. Cataloguers realize the need for improving their knowledge and skills, even through formal education. 31 (25.83%) 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
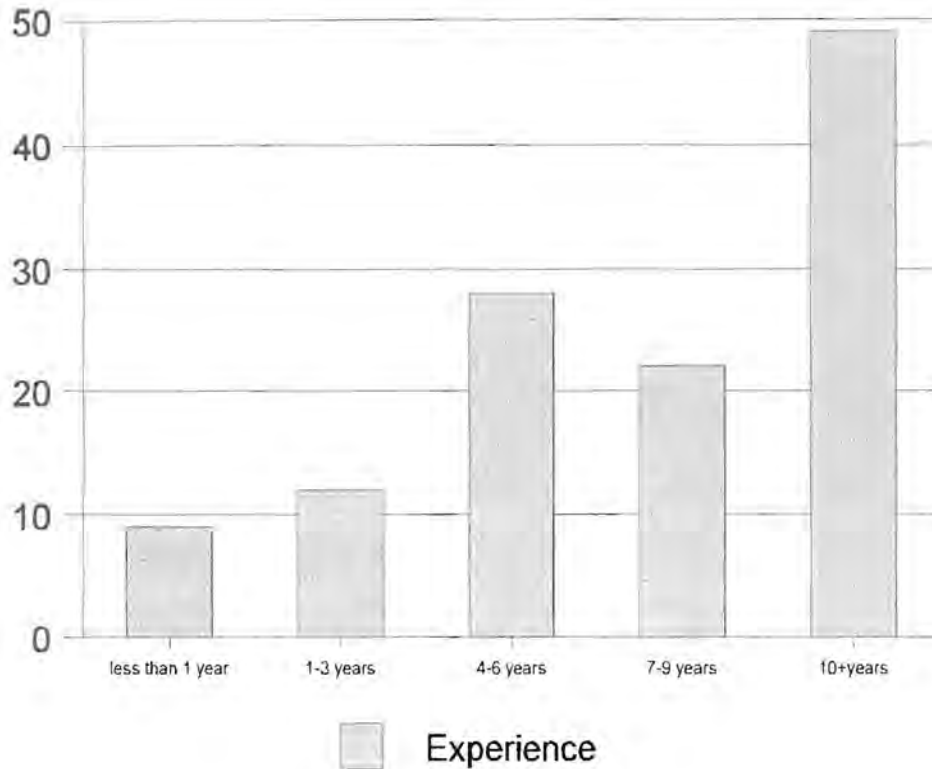
The response shows that cataloguers in university libraries are very experienced and have been cataloguers for a long time. Responses on evaluation of their education and training (section C of the questionnaire), can hardly be taken into consideration, because it was too long ago. If experience is a 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
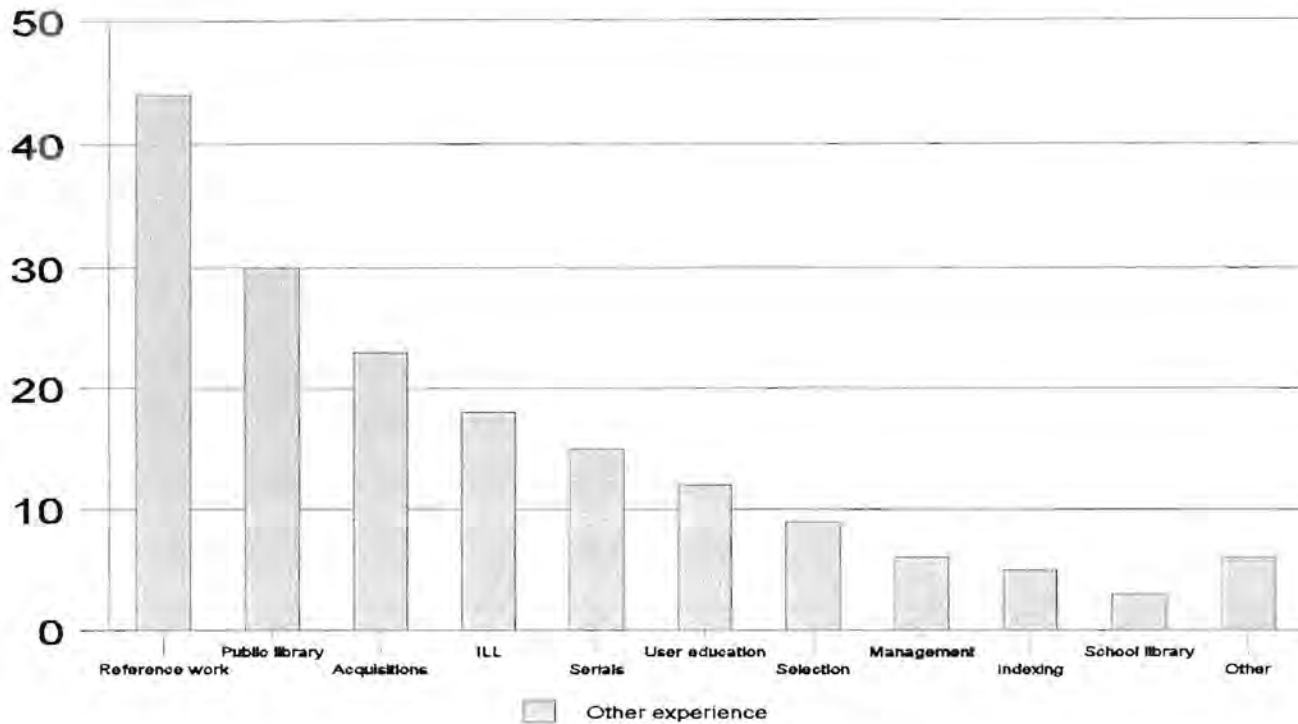
Responses to this question were varied and difficult to analyse. There were no specific jobs stated as in question 11 and thus all other duties they have performed were entered here. The aim of the question was to establish experience that cataloguers have which could be of relevance to cataloguing. 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**
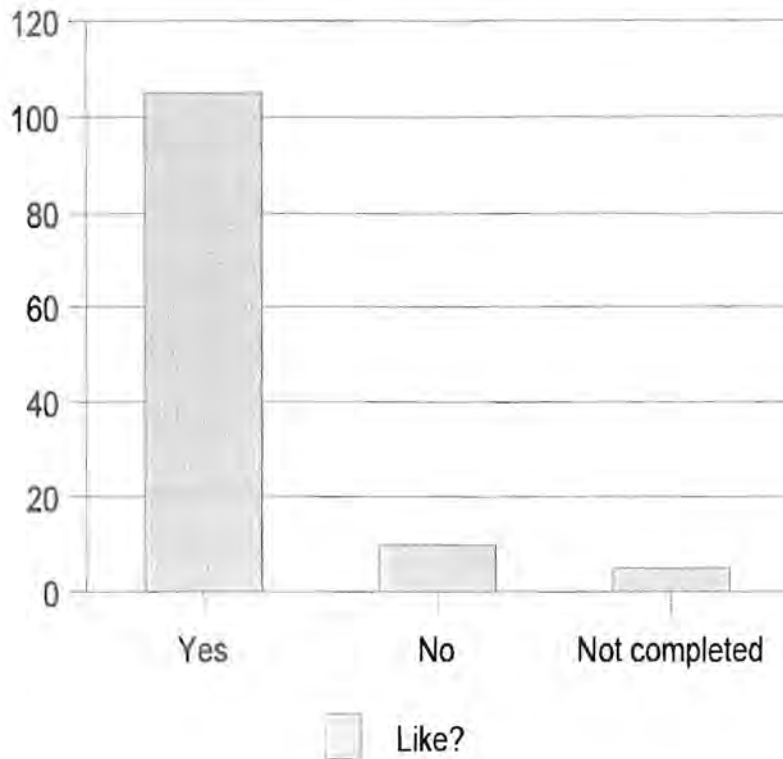
Most people doing cataloguing seem to like it, because 115 (95.83%) indicated that they like cataloguing. The general opinion as reflected in literature is that cataloguing is the least liked of library jobs. The findings of this study refute this. Attitudes seem to improve with experience in cataloguing. 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**
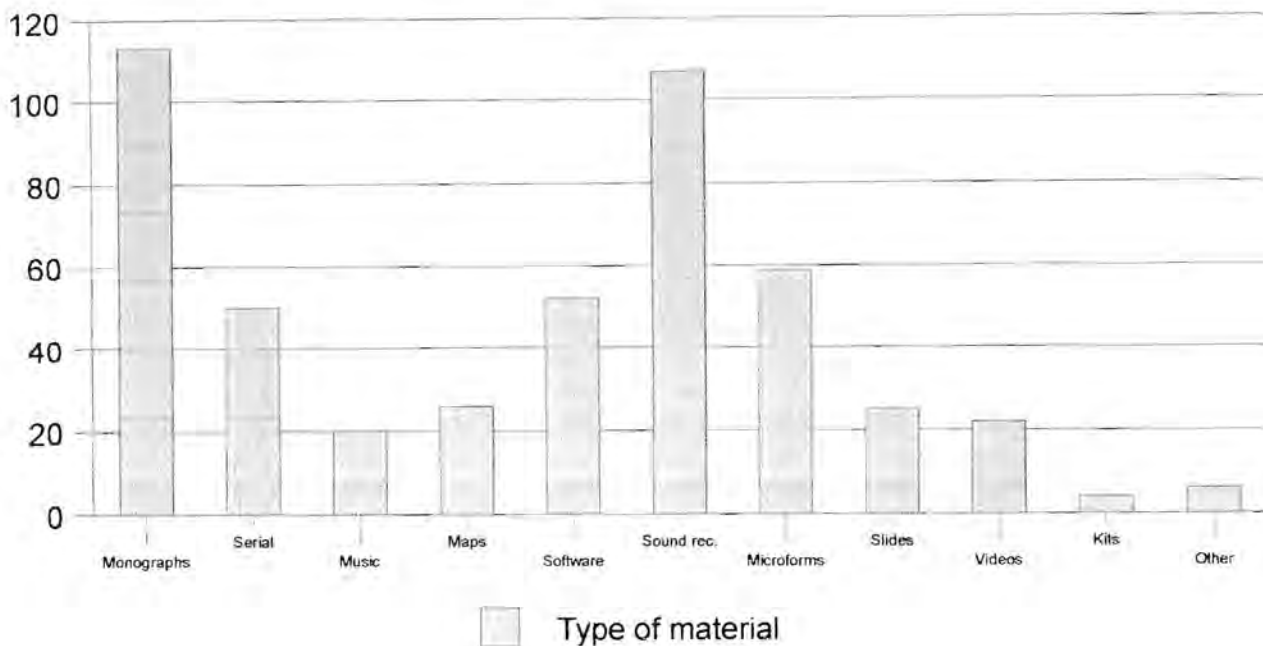
Cataloguers work with a variety of material that may differ from library to library. New formats are continually being added to the traditional print format   Monographs still form a significant part of material catalogued as indicated by 113 (94.17%) respondents. A variety of material formats are evidently 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**
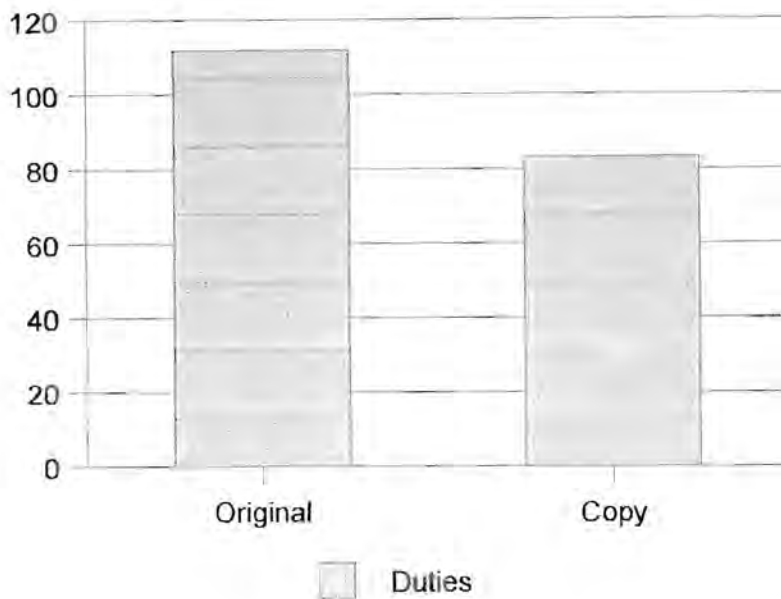
Original cataloguing is done by 112 (93.33%) respondents. A significant amount of copy cataloguing is also still done by the cataloguers, namely by 80 (66.67%). About three quarters of the respondents, do both original and copy cataloguing. Indication that more original cataloguing is being done than 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

97

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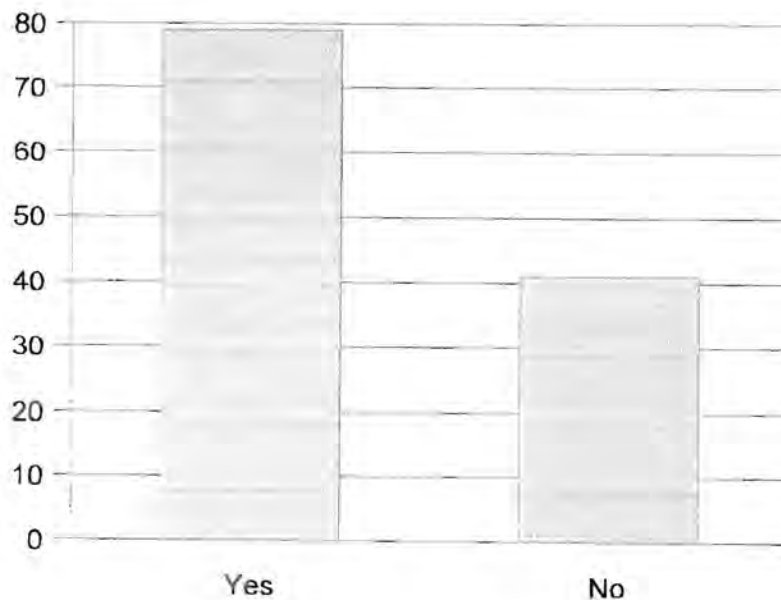
In about twice as many institutions, professional and paraprofessional duties are separated. A list of what is regarded as professional would have been useful here, because many cataloguers might not make a clear distinction between these two categories. From responses to some other questions it can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

### 5.3.2.4   *Is cataloguing in your library centralized?*

Figure 10:   **Centralization of cataloguing staff**

Cataloguing centralized
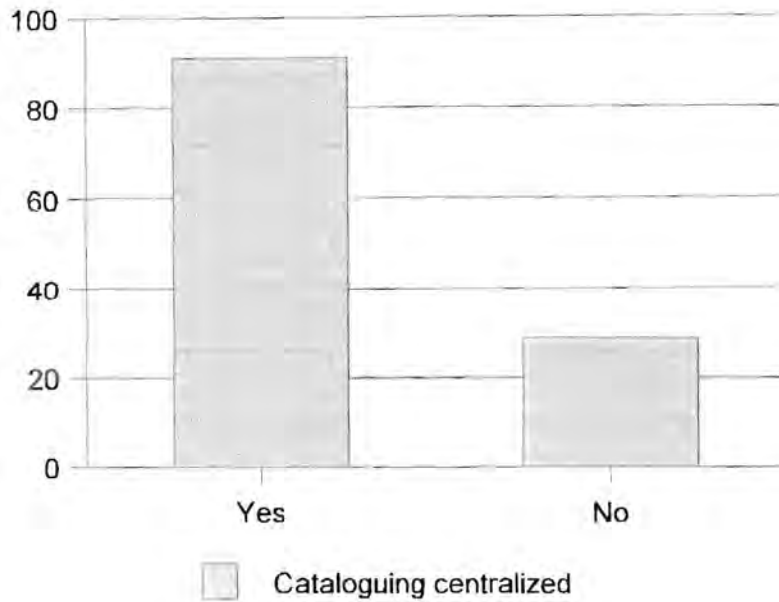
From the response to the question, namely 91 (75.83%) it is clear that cataloguing is still centralised in most university libraries. This means that cataloguers still form a pool. Decentralisation could mean that cataloguing is distributed in service units. Only a few university libraries like Pretoria 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**
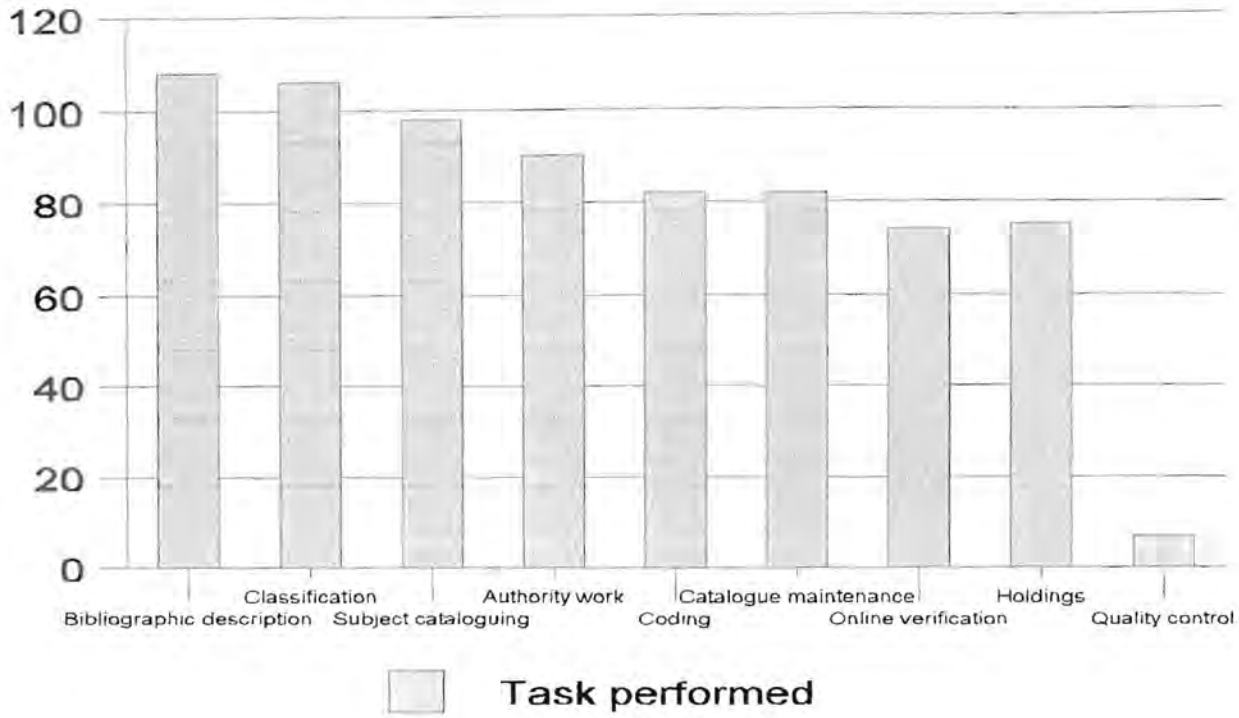
Task performed

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

100

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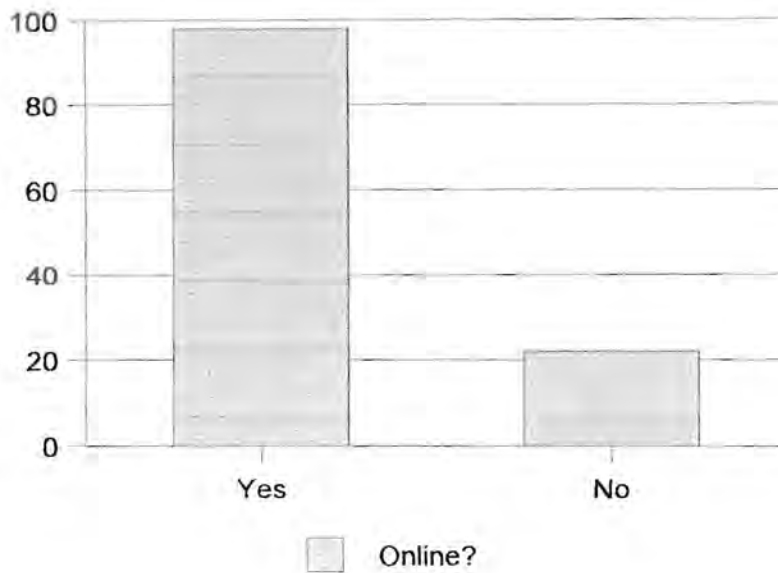
Some cataloguers, 22 (18.33%), indicated that they do not work online, contrary to general opinion. Maybe a question on how they catalogue if not online would have been useful. The general assumption is that all university libraries catalogue online.

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

**Figure 13:   System on which cataloguing is done**
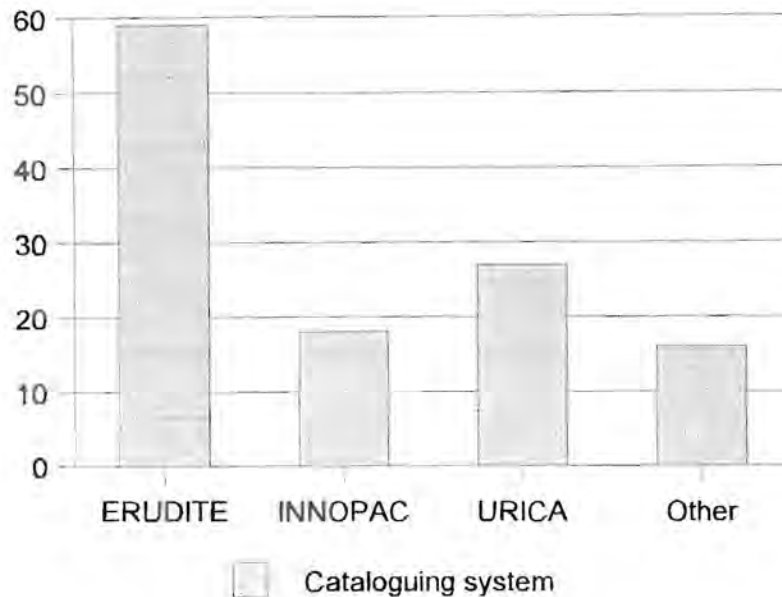
The question was meant to find out which systems (e.g. ERUDITE) are in use in the different libraries.

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
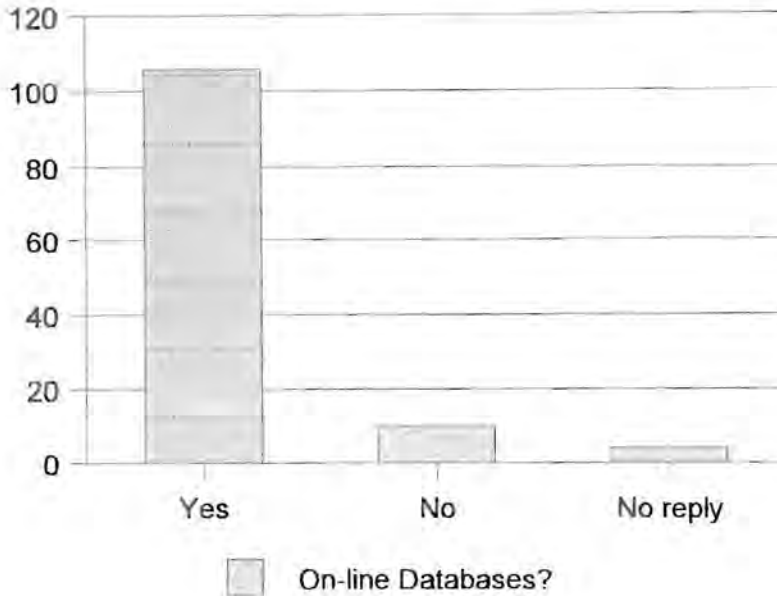

As to whether other online databases are used for copy cataloguing, 106 (88.33%) answered that they do . 10 (8.33%) respondents answered that they are not using online databases (probably SABINET) for copy cataloguing. It will be interesting to know why this is the case. Local deviations from standards 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**
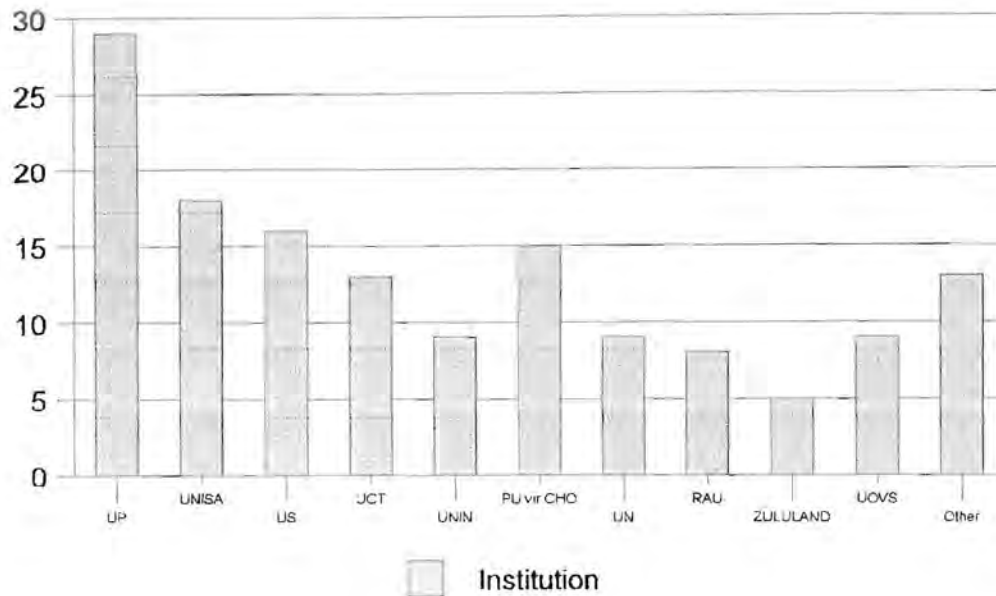
The first question in this category established the institution where cataloguers received their education. The size of library schools vary and many have since ceased to exist. The University of Pretoria apparently produced the majority of practising cataloguers. This could be due to the high number 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**
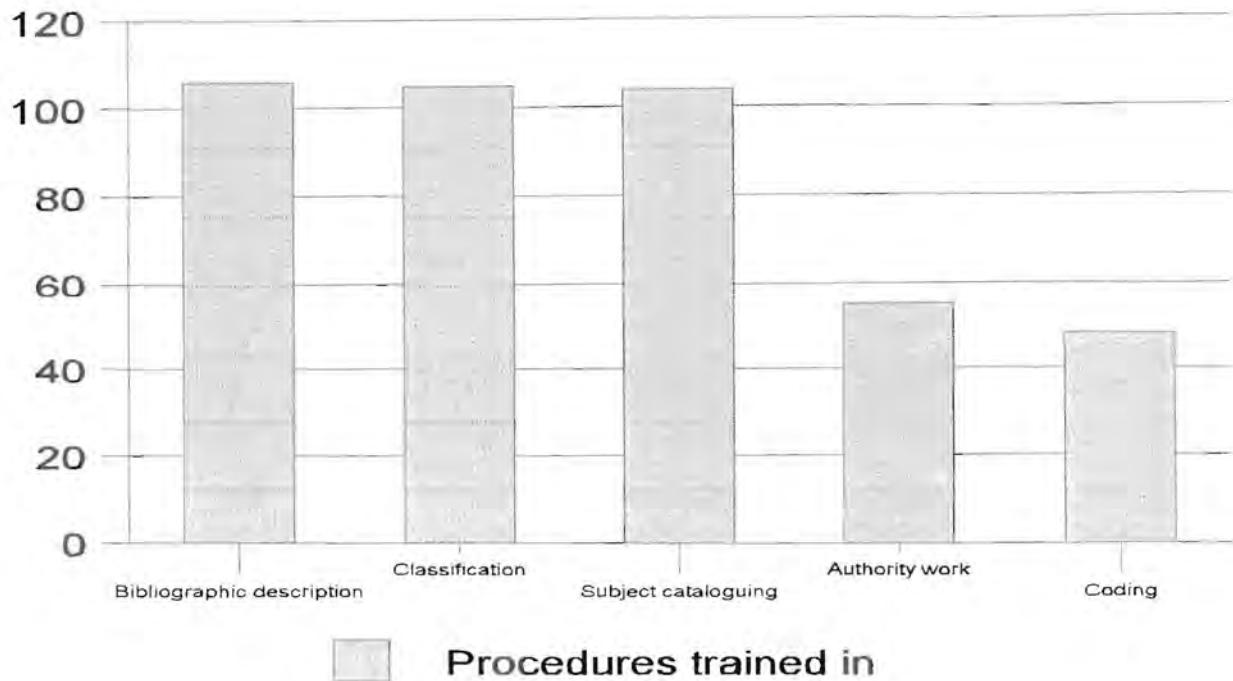
The respondents received education in various cataloguing procedures. Authority work is rated quite low, namely 55 (45.83%) probably because it is not easy to teach theoretically but mainly through training on the job. Coding of data was rated the lowest. As many cataloguers who completed the questionnaire 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**
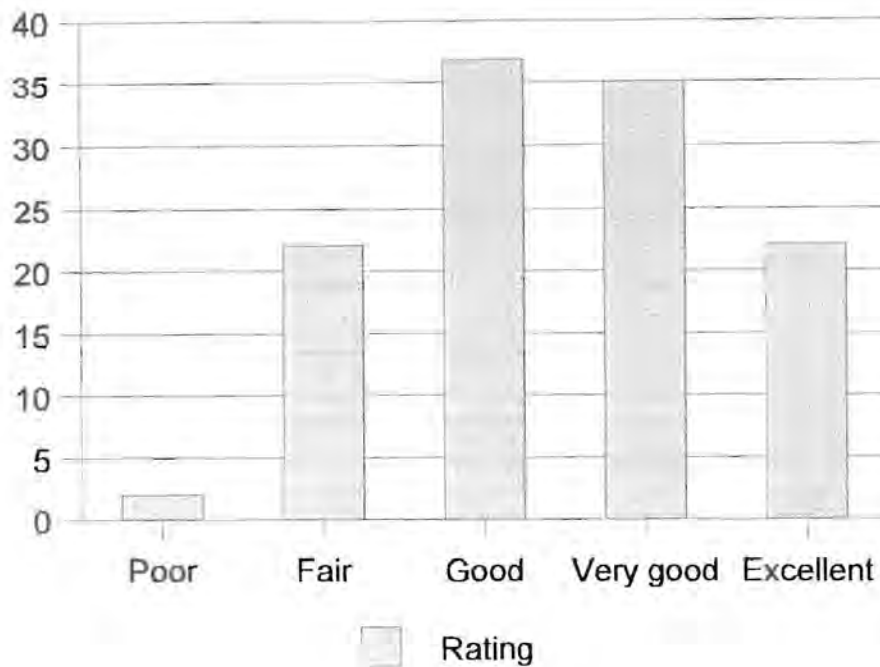
By far the most respondents regard their cataloguing training as good (37 (30.83%)) or very good (35 (29.17%)) even though it might have been long ago. 22 (18.33%) rated the knowledge gained to be fair and only 2 (1.67%) as poor. In the past much more time was devoted to cataloguing in the curriculum 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?*
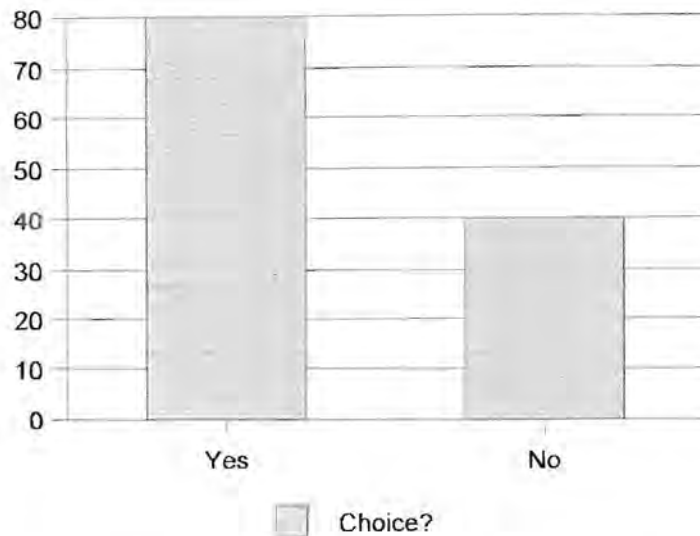
Figure 18:   **Cataloguing as a prospective job**
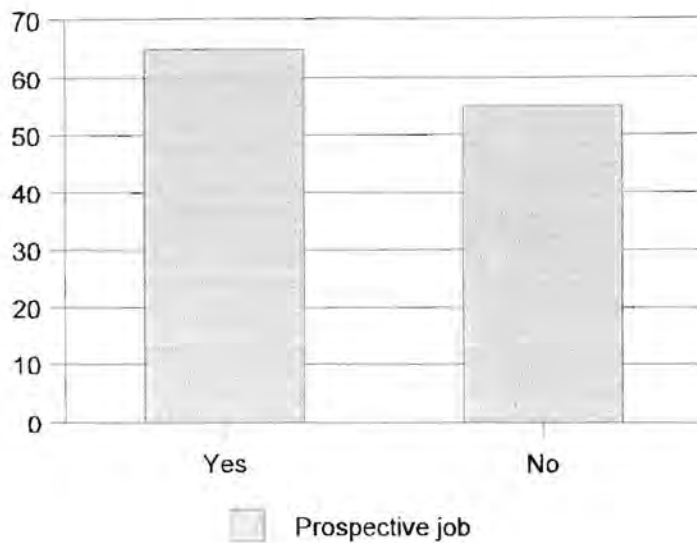
Most of the respondents 65 (54.17%) declared that they like cataloguing. Most students probably do not perceive cataloguing as a prospective job after completion of their studies, but are appointed in cataloguing posts.

**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 (40 933.33%)) 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

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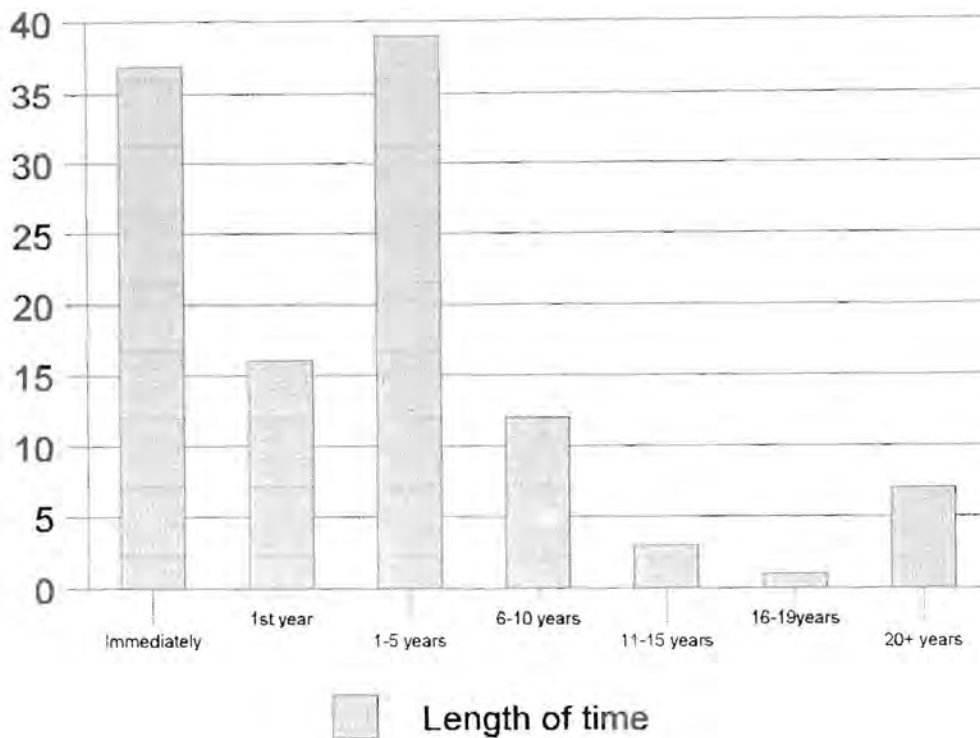
Quite a number started cataloguing immediately or soon after qualifying. Only 53 (44.17%) started cataloguing within the first year of working. It is amazing that so many started cataloguing after quite a number of years. It is a debatable point whether they still remembered much from their studies.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

109

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
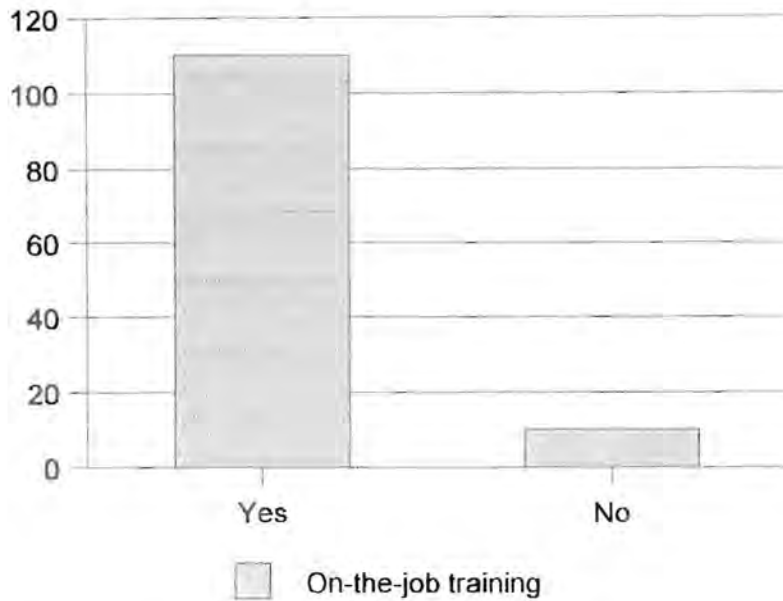
As institutions differ so much in their cataloguing procedures, it is taken for granted that all cataloguers should receive in service training. It is impossible for library schools to deliver students who know enough about cataloguing to start working on their own without on-the-job training. 10(8.33%) 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

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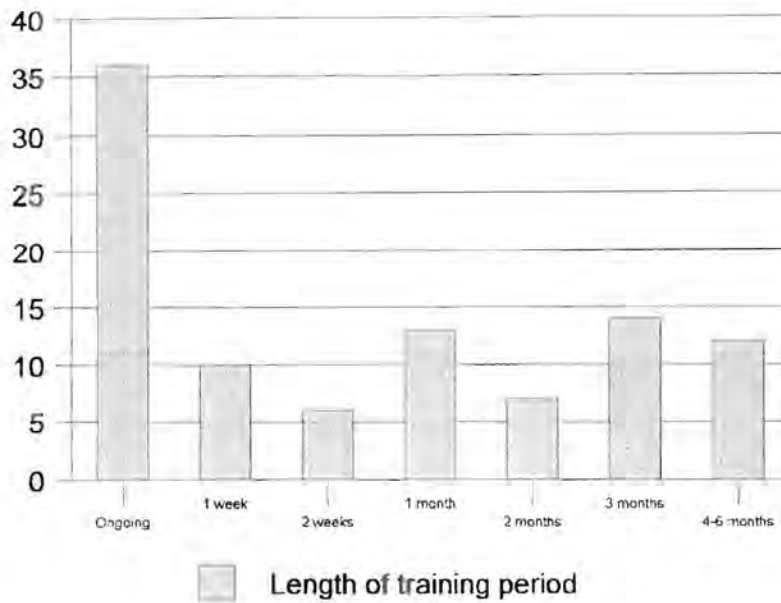
There is quite a difference in the length of time devoted to traing. Only 14 (11.67%) indicated ongoing training. Those who indicated the period of training in years were also grouped under ongoing training, increasing the number to 36 (30%). 22 (18.33%) did not complete this part of the question, which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

5.3.3.8   *Which training methods were used during your training period ?*
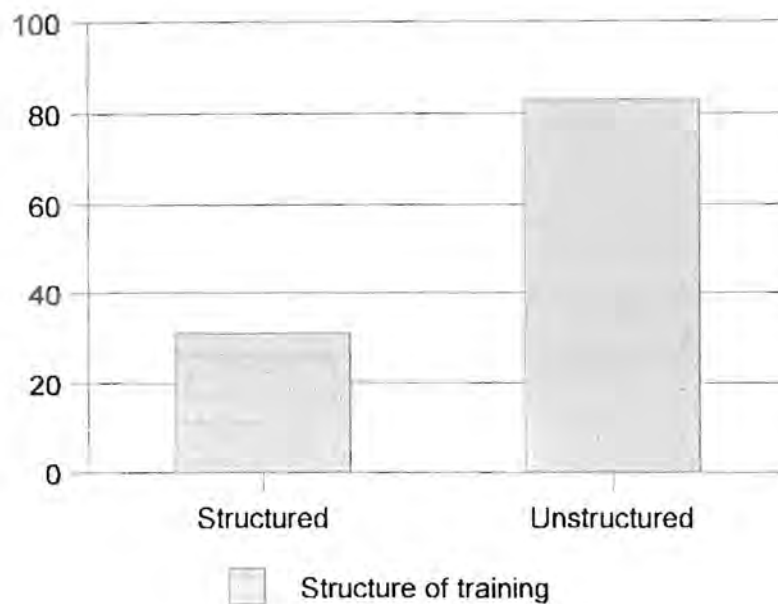
Figure 23:   Training methods used
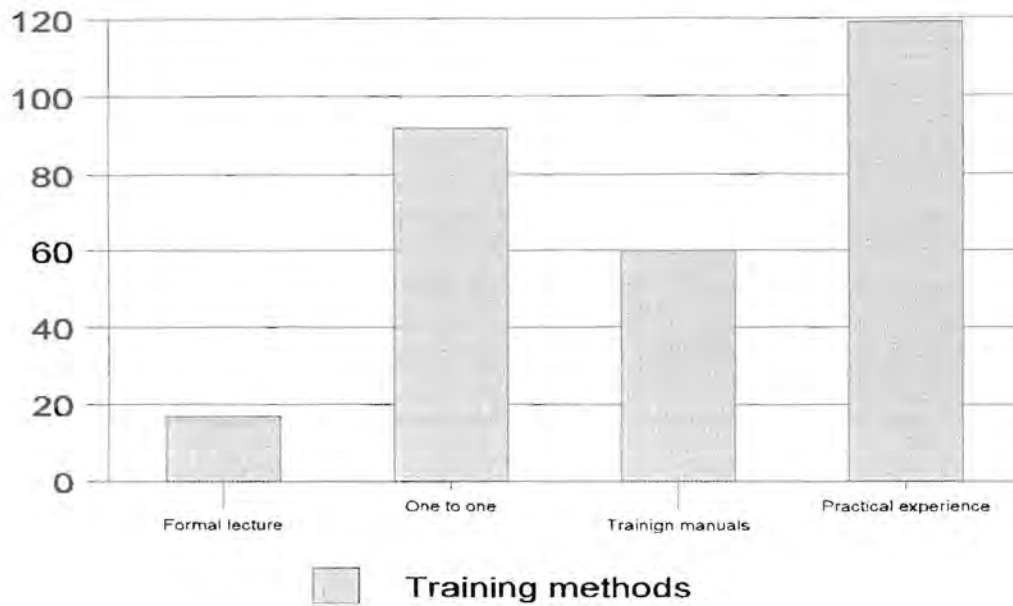
It seems as if working under supervision while cataloguing, after the initial in service training was completed, is regarded as the most useful method. Use of lectures and training manuals is less common.

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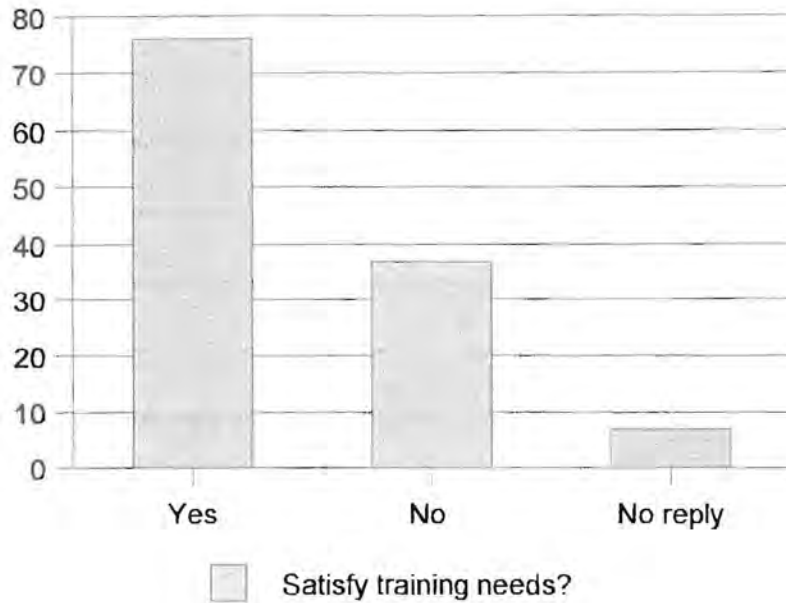
Just more than half (76 (63.33%))feel that their in service training was adequate. The rest (37 (30.83%)), was not satisfied and 7 (5.83%) did not answer the question. It is significant that so many respondents feel their trainin was not adequate.

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
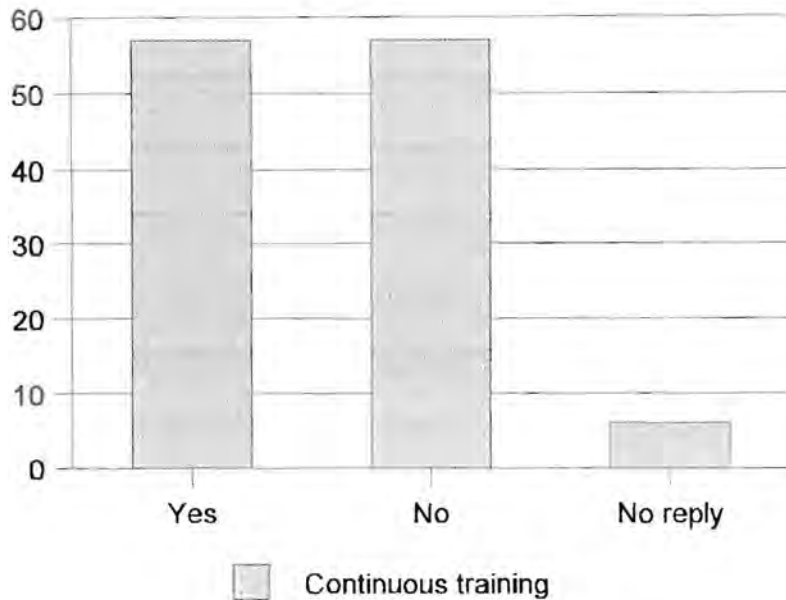
It seems that half of the institutions have a continuous in service training programme 57 (47.5%) replied yes and the same number replied no. It would have been useful to know for which areas of the work this was provided and how they feel about it. The difference between "ongoing" as used in question 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
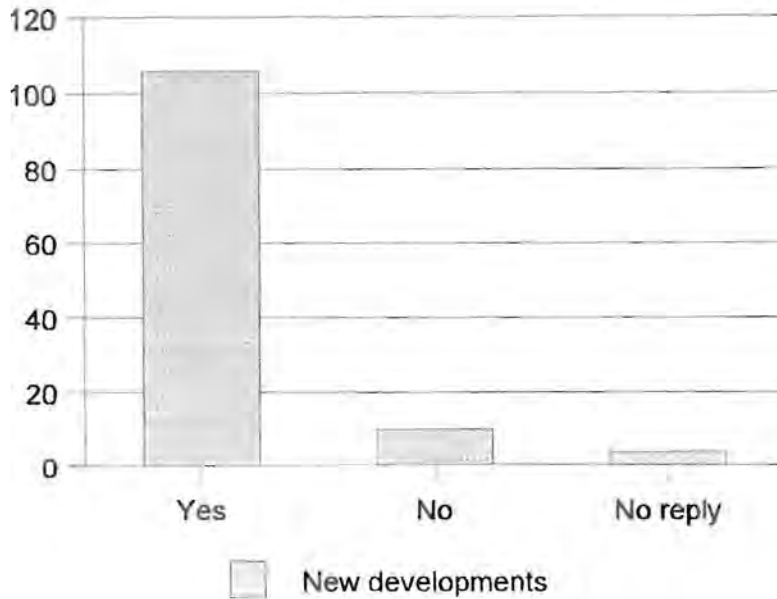
By far the most cataloguers (106 (88.33%)) are kept informed about new developments. It would have been interesting to know how this was achieved. Possible methods are mentioned, but it is not known which the best methods are. is. This would have been useful when making recommendations for better training 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.
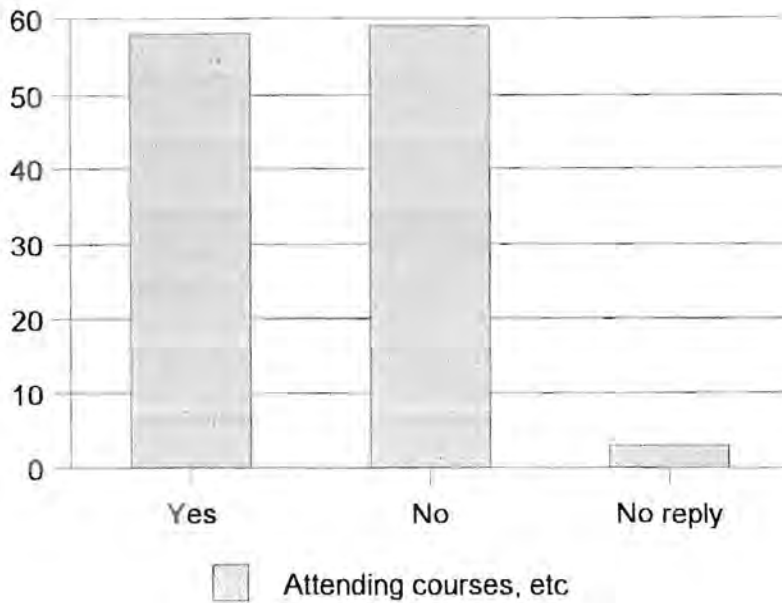
This only refers to opportunities missed and does not really correspond to replies to the previous question. 58 (48.33%) indicate that they knew of opportunities, but coul not attend. It is not clear why they did not attend the courses etc. Staff is kept up to date, according to the previous question, 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**
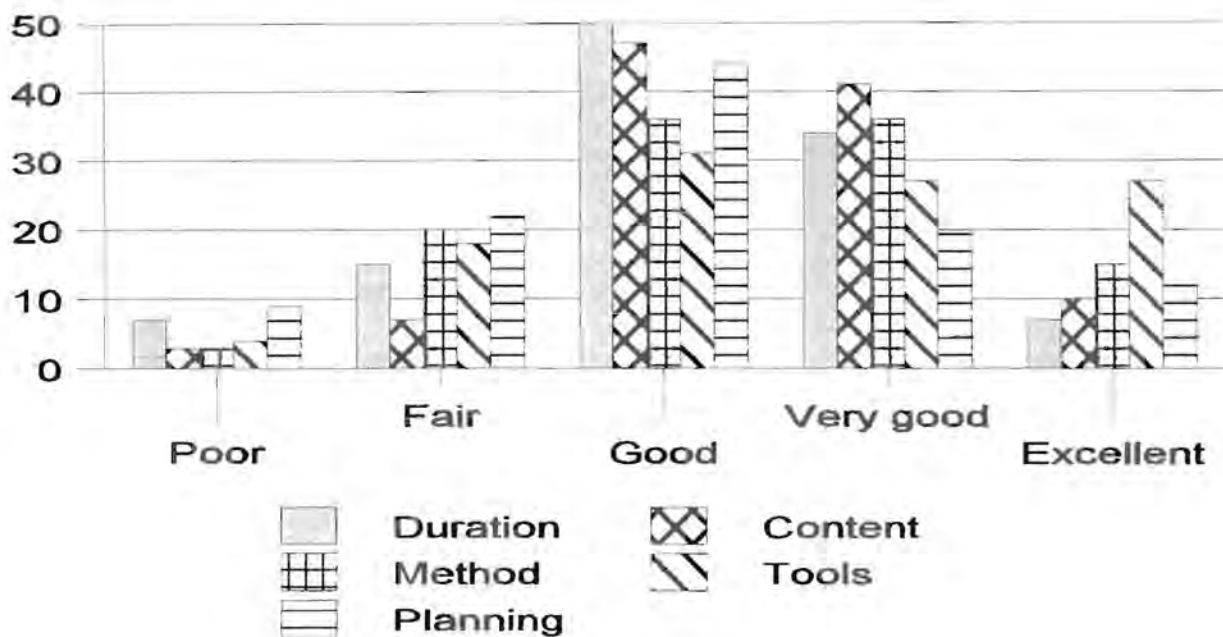
The evaluation of training methods is perceived to be good and upwards in respect of all the factors named. Not many found it poor to fair. It seems as if planning of programmes is not satisfactory.

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
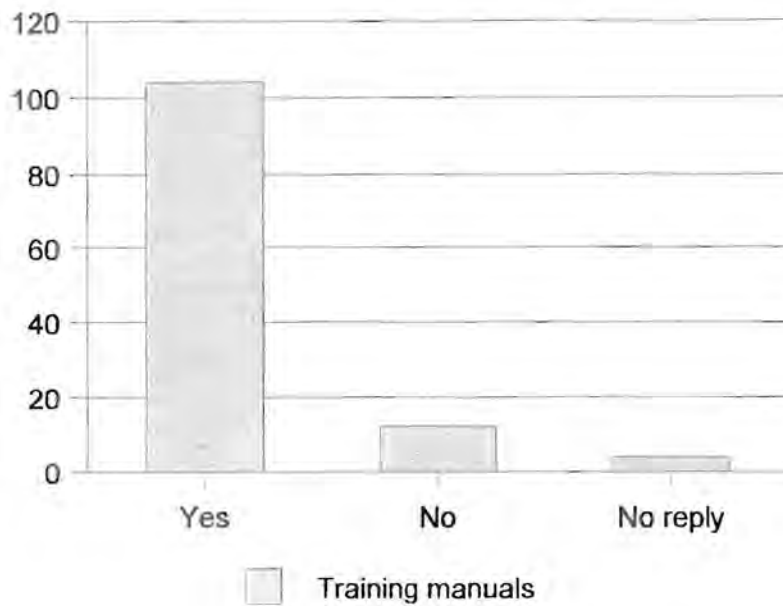
Most respondents (104 (86.67%)) indicated that training manuals are available and 12 (10%) indicated that no manuals are available. Indication of which training manuals would have been useful. Just knowing that there are manuals, but not which does not help much when making recommendations. In question 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.

121

5.3.4.3 Are cataloguing standards regularly updated in your library?

Figure 33: Updating of standards
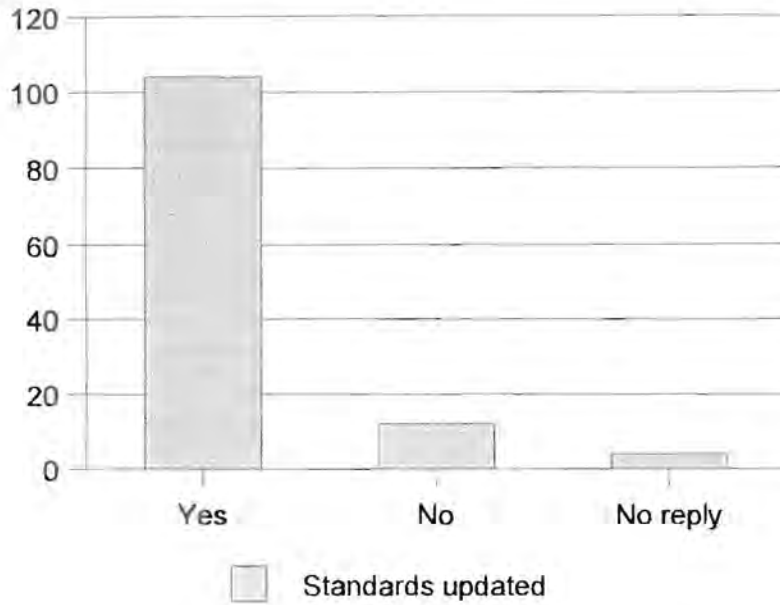
Although 104 (86.67%) answered yes and 12 (10%) no, it would have been better to list possibilities and have respondents mark them. Just knowing that standards are updated, but not which standards is not very useful.

5.3.4.4   Is the quality of your cataloguing evaluated ?

Figure 34:   Evaluation of cataloguing
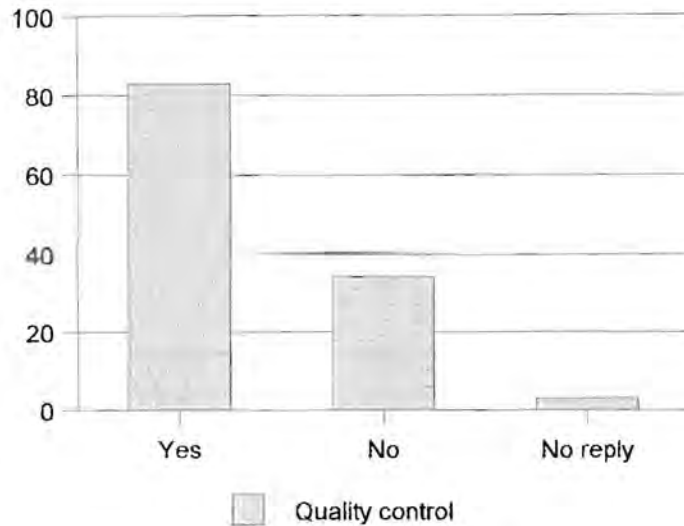
More than two thirds 83 (69.17%)) indicate that quality is evaluated. Most respondents did not reply to this question, but in most cases it seems that the head of the department or the supervisor does the checking.

Figure 35:   By whom the evaluating is done
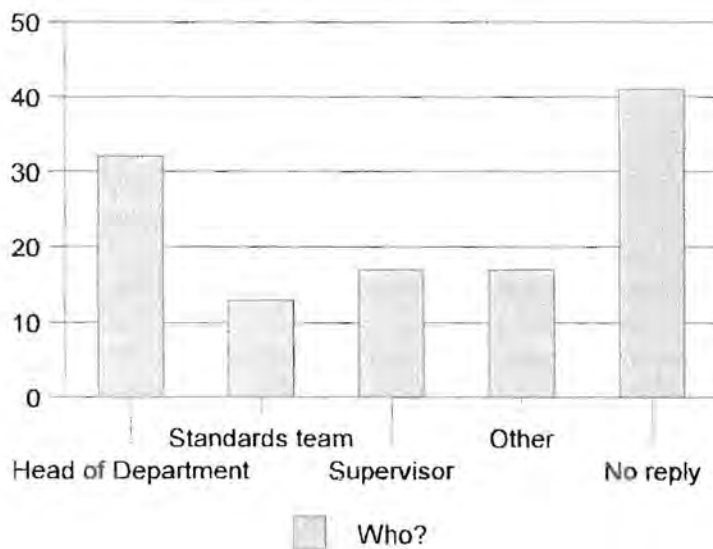
5.3.4.5 *Is there a way of discussing your training needs with your supervisors or trainer on a regular basis*

Figure 36: Discussion of training needs
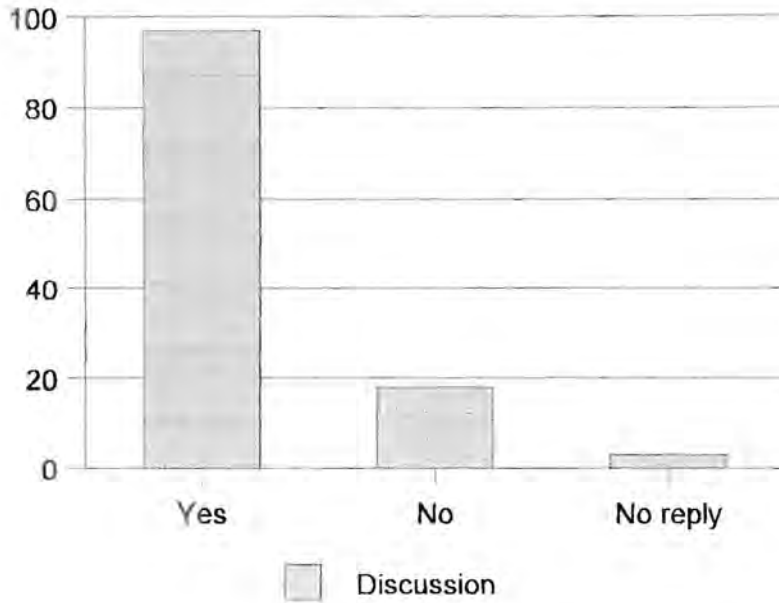
It seems as if most of the cataloguers (97 (80.83%)) can bring training needs to the attention of their supervisors, who should then take the responsibility of arranging for providing in these needs. 18 (15%) do not discuss training needs with their supervisors.

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

Figure 37:   Additional comments

Additional comments
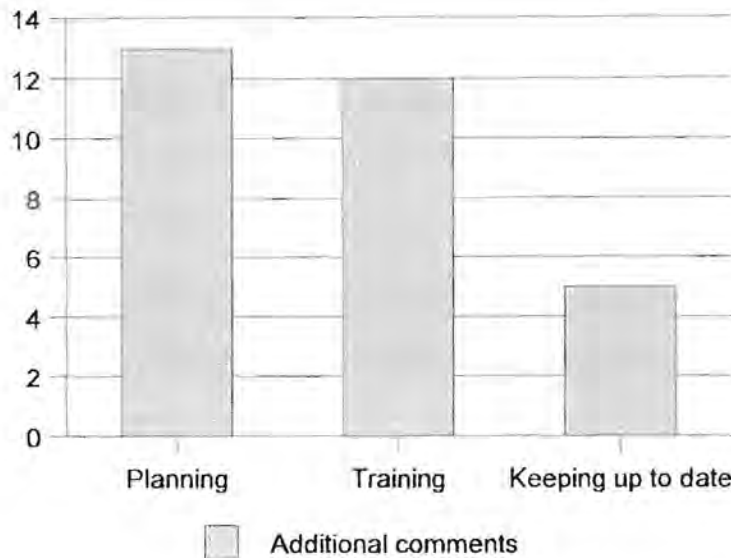
This open ended question was almost impossible to analyse. Only the items that were mentioned most were given here. The rest was incorporated with question 29. Most respondents felt that planning of training is essential. Specific areas of training needs were mentioned again, even though previous question also dealt with that. Some librairies 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

126

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

131

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 facilities 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.

133

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.

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Appendices

Appendix A Questionnaire

NEEDS ANALYSIS FOR THE TRAINING OF CATALOGUERS IN
ACADEMIC LIBRARIES

In the past decade, the task cataloguers perform have changed radically. As a cataloguer, I am convinced of the importance of the proper education and training of cataloguers to equip them with the necessary knowledge and skills to meet their job challenges. As part of my studies for a MBibl degree, I am doing this survey in order to get your opinion as cataloguers on this matter. Since the results of this survey will be used to suggest improvements on the training of cataloguers, your most genuine response and cooperation will be appreciated. Please complete the questionnaire and return it to the following address :

K A Maphopha
P O Box 5289
Pietersburg North
0750

I would appreciate it if your completed questionnaire can be returned before : 15 November 1998

You can also contact me on the following :   **Tel**   **015-268 2467 (w)**
                                              Fax: **015-268 2198**
                                              E-mail   **KhomotsoM@unin.unorth.ac.za**

GENERAL					
1.	INSTITUTION				
2.	POSITION	Full-time		Part-time	
3.	QUALIFICATIONS				
4.	EXPERIENCE (as a cataloguer)				

less than 1 year	
1-3 years	
4-6 years	
7-9 years	
10+ years	

5. What other (outside cataloguing) library work experience do you have ?

6. Do you like cataloguing work ?

Yes		No	

B TASK PERFORMANCE

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

7. What type of library materials do you catalogue?

Monographs	
Serials	
Music	
Cartographic materials	
Computer software	
CD's	
Sound recordings	
Microforms	
Slides	

Others (Please specify)

8. Which of the following duties do you perform ?

Original cataloguing	
Copy cataloguing	

9. Is the cataloguing work divided into professional and paraprofessional in your library?

Yes		No	

10. Is cataloguing in your library centralized?

Yes		No	

11. Which tasks do you perform ?

Bibliographic description	
Classification	
Subject cataloguing	
Authority work	
Coding (MARC)	
Catalogue maintenance	
On-line verification	
Holdings data input	

Others tasks – cataloguing or not (please specify)

12. Do your work online ?

Yes		No	

13. Which system do you use for cataloguing (eg ERUDITE)

14. Do you use other on-line databases for copy cataloguing (eg SABINET, OCLC, Prompcat, etc.)

Yes		No	

C EDUCATION AND TRAINING HISTORY

15. Where did you receive our librarianship education?

16. In which cataloguing procedures did you receive education?

Bibliographic description	
Classification	
Subject cataloguing	
Authority work	
Coding (MARC)	

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

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

18. Did you perceive cataloguing as a prospective job?

Yes		No	

19. Did you choose to become a cataloguer?

Yes		No	

20. How long after qualifying did you start to do cataloguing work ?

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

Yes		No	

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

22. Which training methods were used during your training period ?

Formal lecture	
One to one verbal training	
Individual reading of training manuals	
Practical cataloguing with error correction by trainer	

Others methods (Please specify)

23. How was your cataloguing training programme structured ?

Formally structured		Unstructured	

24. Did the training you receive on the job satisfy all your training needs ?

Yes		No	

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

Yes		No	

26. 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.)

Yes		No	

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

Yes		No	

28. Please rate your library training programme for cataloguing in terms of identified features:

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

Duration	
Content	
Methods	
Training tools	
Planning	

29. What areas of cataloguer training at your institution need improvement on ?

D TRAINING NEEDS

30. On which aspects of the work you are doing would you prefer to receive more intensive training ?

Bibliographic description	
Classification	
Subject cataloguing	
Authority file work	
Coding (MARC)	
Catalogue maintenance	

Others (Please specify)

31. Do you have any training manuals in your library ?

Yes		No	

32. Are cataloguing standards regularly updated in your library?

Yes		No	

33. Is the quality of your cataloguing evaluated ?

Yes		No	

If yes by whom ?

34. Is there a way of discussing your training needs with your supervisors or trainer on a regular basis ?

Yes		No	

35. Give additional comments on your present and future needs for improved training for your present position