Survey Instrument for use in project entitled

“Survey of the Extent and Utilization of Cataloging Tools and Resources within Technical Services in the North Texas Public Libraries”

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Introduction

This document describes the three-part survey that will measure the extent and utilization of cataloging tools and resources within technical services departments of North Texas public libraries. This project is funded by an OCLC/ALISE Library and Information Science Research Grant (LISRG) <http://www.oclc.org/research/grants/default.htm>.

Included are

- Part I : Questionnaire
- Part II : Follow-up Interviews
- Part III : Focus Group Sessions

Templates for the invitation letter and follow-up emails are included in the Appendices, as is the original proposal. The project website (currently under construction) can be found at <http://courses.unt.edu/smiksa/Projects/CTRNT_index.htm>.

Recruitment Procedure

Research study participants will be recruited from the public libraries in the North Texas Regional Library System (NTRLS) and the North East Texas Library System (NETLS). Letters will be mailed to the Director of each public library, requesting the participation of the library’s technical services personnel. See Appendix A for the letter template.
Part I Survey using SurveyMonkey.Com

Greetings:

The quality control of all bibliographic records, whether outsourced or original, falls under the responsibility of the catalogers who provide bibliographic control for one or more libraries. This responsibility in turn greatly depends on the catalogers’ knowledge of and expertise with the cataloging tools and resources available to them.

Please take a few minutes and complete this survey. Your input is essential and will contribute to and may have a significant impact on the field of library and information science, particularly in the area of bibliographic control. There are 67 questions in the survey:

* Section A – questions about where you work, your position, and your library automation system
* Section B – questions about the present state of cataloging resources and tools within your library

The survey is available until March xx, 2005.

Thank you for your participation!

For more information regarding this project, please visit our website at http://courses.unt.edu/smiksa/Projects/CTRNT_index.htm

Informed Consent Notice for UNT Cataloging Tools & Resources Library Survey

The purpose of this research study is to ascertain the utilization of cataloging tools and resources with public libraries in the North Texas region. You will be asked to complete a survey about the tools and resources used in your technical services department. This survey will take approximately 30 minutes to answer. You must be 18 years of age or older to participate. Completion of this survey involves no foreseeable risks.

Participation is voluntary and you may stop at any time. You give consent by completing the survey. No individual responses will be reported to anyone because data will be reported only on a group basis. If you have any questions regarding this study, please contact Dr. Shawne Miksa at: smiksa@unt.edu, University of North Texas School of Library and Information Sciences (940) 565-3560.

This project has been reviewed and approved by the University of North Texas Institutional Review Board (940) 565-3940. You may print a copy of this Informed Consent Notice for your records.
OCLC/ALISE Cataloging Tools and Resources Survey

We appreciate your input to this study of the use of cataloging tools and resources within technical services departments of public libraries in the North Texas Regional Library System. Thank you for taking the time to help us!

Please tell us about yourself….
1. Indicate the choice that best describes your current position within your library.
   - Director
   - Professional Staff
   - Paraprofessional Staff
   - Cataloging
   - Electronic resources
   - Technical services
   - Technology/Automation/Web training/Instruction
   - LIS Student
   - Volunteer
   - Intern
   - Other (please specify)

2. Are you:
   - Female
   - Male

3. How long have you worked within a library?
   < 6 months
   6 mos. to 1 yr.
   1 – 5 years
   6 – 10 years
   11 – 15 years
   16 – 20 years
   21 – 25 years
   26 – 30 years
   31 – 35 years
   > 35 years

4. How long have you worked in your current position in your library?
   < 6 months
   6 mos. - 1 yr.
   1 – 5 years
   6 – 10 years
   11 – 15 years
   16 – 20 years
   21 – 25 years

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26 – 30 years
31 – 35 years
> 35 years

5. Please indicate Your formal library/information training or certification level
   High school or GED
   Associate Degree
   Bachelor’s Degree
   Master’s Degree; non-ALA accredited school
   Master’s Degree; ALA accredited school
   Doctorate
   Other (please specify)

6. Please indicate your Cataloger’s formal library/information training or certification level
   High school or GED
   Associate Degree
   Bachelor’s Degree
   Master’s Degree; non-ALA accredited school
   Master’s Degree; ALA accredited school
   Doctorate
   Other (please specify)

Please tell us about your library…

7. Where is your library located?
   Urban
   Suburban
   Rural

8. What type of library do you work in?
   Central or Main
   Branch
   System Office

9. Is your library a:
   Public Library
   School Library
   Combined
10. What library automation system/integrated library system is installed in your library? If your system is not listed, please enter the name in the space provided.

(Respondents are given a drop-down list of vendors to choose from)

<table>
<thead>
<tr>
<th>Library Automation System</th>
<th>Vendor Name</th>
<th>Vendor Name</th>
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<tbody>
<tr>
<td>Unknown or Home-Grown</td>
<td>Databasix Information Systems</td>
<td>Libris</td>
</tr>
<tr>
<td>None</td>
<td>Dataware (Hungary)</td>
<td>Libros</td>
</tr>
<tr>
<td>Not sure</td>
<td>DOBIS</td>
<td>LIBSYS</td>
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<td>ABSYS</td>
<td>Docbase</td>
<td>LIMEDIO</td>
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<tr>
<td>ADLIB</td>
<td>DS Limited</td>
<td>Lohika Systems</td>
</tr>
<tr>
<td>AIMS/Masterfile</td>
<td>Dynix ILS</td>
<td>Mandarin Library Automation</td>
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<tr>
<td>Akros Informatica S.r.l.</td>
<td>Easy Web (Italy)</td>
<td>Manitou (UQAM)</td>
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<tr>
<td>ALEPH (Ex Libris)</td>
<td>Eidetica</td>
<td>Maxcess Corporation (Verso)</td>
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<td>allegro C</td>
<td>ELIAS - AMICUS</td>
<td>Metamarc</td>
</tr>
<tr>
<td>ALS International</td>
<td>Endeavor Information Systems</td>
<td>Micro Consulting</td>
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<td>AMICUS</td>
<td>EOS International</td>
<td>Mikromarc</td>
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<td>Amlib NetOpacs</td>
<td>Epixtech inc.</td>
<td>MINISIS</td>
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<td>Argonauta</td>
<td>Europider Information Technology</td>
<td>NACSIS Webcat</td>
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<tr>
<td>askSam</td>
<td>Eurotec Consultants Ltd</td>
<td>NCS (Napier Computer Systems)</td>
</tr>
<tr>
<td>ATP Library Systems Ltd</td>
<td>Ever-Team - Loris</td>
<td>NuGen Systems Inc. (Lib/Net)</td>
</tr>
<tr>
<td>Auto-Graphics</td>
<td>Excalibur Technologies Corporation</td>
<td>OCLC</td>
</tr>
<tr>
<td>AVC Corporation</td>
<td>Follett Software Company</td>
<td>Octopus Team</td>
</tr>
<tr>
<td>Axiell Biblioteksystem AB (Sweden)</td>
<td>Gateway Software Corporation</td>
<td>PALS</td>
</tr>
<tr>
<td>B.O.N.D. Biblioteksysteme</td>
<td>Geac (GeoWeb)</td>
<td>Paradigm System</td>
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<tr>
<td>BARATZ</td>
<td>Geac Advance</td>
<td>Pica</td>
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<tr>
<td>BASIS Tchlib</td>
<td>Geac BOOK Plus</td>
<td>Reference Web Poster</td>
</tr>
<tr>
<td>Best-Seller Inc.</td>
<td>Geac Vubis Original</td>
<td>Regard</td>
</tr>
<tr>
<td>Biber GmbH</td>
<td>Geac VubisSmart</td>
<td>Ruslan</td>
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<td>BIBLIosoft</td>
<td>Geac VubisWeb</td>
<td>SABINI</td>
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<td>Bibliotek-Systemer A/S</td>
<td>GIS Information Systems</td>
<td>Sagebrush (Spectrum)</td>
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<td>Bibliotekservise</td>
<td>glifos.com</td>
<td>Sagebrush Technologies (Athena)</td>
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<tr>
<td>BibliotekstjM-dnst (Sweden)</td>
<td>Hardcover Software</td>
<td>Sanderson Computers Limited</td>
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<tr>
<td>Bibsys</td>
<td>Highland Library Systems</td>
<td>(Spydus)</td>
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<tr>
<td>BIDOC</td>
<td>Horizon</td>
<td>SBN</td>
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<tr>
<td>BLISS</td>
<td>Hudson Valley Technologies</td>
<td>Sintagma</td>
</tr>
<tr>
<td>Bond</td>
<td>ICCU (SBN) (Italy)</td>
<td>SIRS Mandarin</td>
</tr>
<tr>
<td>Book Systems</td>
<td>ILMU (custom)</td>
<td>SIRSI Corporation</td>
</tr>
<tr>
<td>Brocade</td>
<td>INFLIBNET</td>
<td>Sisis</td>
</tr>
<tr>
<td>Brodart</td>
<td>infoQuest</td>
<td>SLS (Hong Kong)</td>
</tr>
<tr>
<td>BVS by BTC</td>
<td>Inmagic</td>
<td>SLS (Information Systems)</td>
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<tr>
<td>BVS-Lib</td>
<td>Innovative Interfaces</td>
<td>(Sweden)</td>
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<tr>
<td>CARL</td>
<td>Insight Informatics</td>
<td>Société GRICS ( REGARD)</td>
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<td>CASPR</td>
<td>Insignia</td>
<td>Softlink</td>
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<tr>
<td>CDS/ISIS</td>
<td>IS Oxford Ltd. (Heritage)</td>
<td>SOLARS</td>
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<td>CHEMDATA</td>
<td>ISIS</td>
<td>SPEKTRA</td>
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<td>CILIUS (Japan)</td>
<td>it ALISE</td>
<td>Spydus</td>
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<tr>
<td>COBA</td>
<td>Jim Bruce Lex Systems</td>
<td>Supermax</td>
</tr>
<tr>
<td>COBISS</td>
<td>Kelowna Software</td>
<td>Surpass Software</td>
</tr>
<tr>
<td>CoBIT</td>
<td>Keystone Systems</td>
<td>SydneyPLUS</td>
</tr>
<tr>
<td>COMPation Corporation (Alexandria)</td>
<td>Koha</td>
<td>Talis Information Limited</td>
</tr>
<tr>
<td>Contec Library Systems Software</td>
<td>KYBELE</td>
<td>Telus SA</td>
</tr>
<tr>
<td>Cosmotron Systems Ltd</td>
<td>LANiус s.r.o.</td>
<td>TietoEnator Technology AB</td>
</tr>
<tr>
<td>CyberTools</td>
<td>Libero</td>
<td>TINLIB</td>
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<tr>
<td>DABIS</td>
<td>Liberty</td>
<td>TKM</td>
</tr>
<tr>
<td>Data Research Associates</td>
<td>Library Corporation</td>
<td>UNIBIS</td>
</tr>
<tr>
<td></td>
<td>LibrarySoft</td>
<td>URICA</td>
</tr>
</tbody>
</table>
11. Does your library automation system/ integrated library system have a cataloging module?
   Yes
   No

Please tell us about your cataloging services….

12. Does your library utilize the centralized cataloging services of another library?
   Yes
   No

13. Is your library the centralized cataloging service for other libraries?
   Yes
   No
   Does not apply

14. Has your public library entered into an agreement with another library who assumes responsibility for your bibliographic services?
   Yes
   No
   Does not apply

15. Please enter the number of full-time equivalents (FTEs) dedicated to cataloging. An FTE is equal to 40 hours per week.

16. If your library performs its own semi-original or original cataloging, what are the average hours per week?
   Less than 10 hours week
   11 - 20 hours per week
   21 - 30 hours per week
   31 - 40 hours per week
   41 - 50 hours per week
   51 - 60 hours per week
   61 - 70 hours per week
   71 - 80 hours per week
   More than 80 hours per week

17. Do you use Cataloger’s Desktop (online or CD-ROM)?
   Online
   CD-ROM
   No
18. If you answered “Yes” to question 17 please indicate how many of the tools (called Infobases on CD) offered on Cataloger’s Desktop you use on a regular basis.
   Use most of the tools/Infobases (50% or more)
   Use only a select number of tools (less 50%)
   Use only one or two tools (e.g., AACR2, Subject Cataloging Manuals, etc.)
   If other (please specify)

19. Regardless of your answers to questions 17 and 18, please indicate the cataloging tools that are used in your technical service/cataloging departments. For questions 19-24, please check all that apply and indicate how often each tool is used. If not used, please check “NA”

**A. Cataloging Rules**
Anglo-American Cataloguing Rules, 2nd edition, 2002 Revision
Anglo-American Cataloguing Rules, 2nd edition, 1998 Revision
Anglo-American Cataloguing Rules, 2nd edition, 1988 Revision
Concise AACR2, 1998
Concise AACR2, 1988
Use AACR2 via Cataloger’s Desktop (CD-ROM)
Use AACR2 via Cataloger’s Desktop (Online)
Library of Congress Rule Interpretations (LCRI)
ALA Filing Rules
Library of Congress Filing Rules

**20. B. Subject Headings**
Library of Congress Subject Headings, 28th edition, print
Library of Congress Subject Headings, 27th edition, print
Library of Congress Subject Headings, 26th edition, print
Library of Congress Subject Headings, 25th edition, print
Library of Congress Subject Headings, 24th edition, print
Library of Congress Subject Headings, older than 24th edition, print
Library of Congress Subject Headings, online via Classification Web
Library of Congress Subject Headings, online via another institution or source (e.g., Library of Congress)
Subject Cataloging Manuals, via Cataloger’s Desktop
Free-Floating Subdivisions: an alphabetical index (any edition)
Sears Subject Headings, 18th edition
Sears Subject Headings, 17th edition
21. C. Classification
Library of Congress Classification, print, various schedules and editions
Library of Congress Classification, online via Classification Web
Library of Congress Classification, online via another source
LC Cutter table
Cutter-Sanborn tables
Regions and Countries Cutter Table
Geographic Cutter Table for U.S. states and region
Dewey Decimal Classification, 22nd edition, print
Dewey Decimal Classification, 21st edition, print
Dewey Decimal Classification, 20th edition, print
Dewey Decimal Classification, via Web Dewey
Dewey Decimal Classification, via another source or institution
Dewey Decimal Classification, Abridged, 14th edition, print
Dewey Decimal Classification, Abridged, 13th edition, print
Dewey Decimal Classification, Abridged, 12th edition, print
Dewey Decimal Classification, Abridged, via Web Dewey
LCC or DDC workbooks, manuals, etc.

22. D. Cataloging manuals for various formats, etc.
CONSER Cataloging Manual (2002 or older edition)
CONSER Editing Guide (1994 edition only or with all updates through 2002)
Integrating Resources: a cataloging manual
Other Serials/continuing resources cataloging manuals, etc
Descriptive Cataloging of Rare Books, 2nd edition (1991)
Other Rare book cataloging manuals
Cartographic Materials, 2002 Revision
Cartographic Materials, 2002 Revision, with 2004 Updates
Map Cataloging Manual (1991)
Other Map cataloging manuals, etc.
Music cataloging manuals
Audio-Visual cataloging manuals
Archival Moving Images Materials: a cataloging manual via Cataloger’s Desktop
Motion picture and video recording cataloging manuals
Cataloging Non-print and Internet Resources (2002)
Other electronic resource cataloging manuals
Graphic material cataloging manuals
Other cataloging manuals
23. E. Supplementary tools
Cataloging with AACR2 and MARC 21 (Fritz)
Maxwell’s Guide to AACR2
Maxwell’s Guide to Authority Work
Authority control tools or manuals of any kind
Art and Architecture Thesaurus (AAT)
ERIC Thesaurus
Thesaurus for Graphic Materials (1995 print edition or updated online version)
Other thesauri
World Fact Book (CIA)
Dictionaries (biographical, geographical, online, etc.)
Atlases

24. F. MARC tools
BIBCO/CONSER MARC Record Sets
MARC 21 Concise Formats
MARC 21 Format for Bibliographic Data and Updates
MARC 21 Format for Authority Data and Updates
MARC 21 Format for Holdings Data and Updates
MARC 21 Format for Classification Data and Updates
MARC 21 Format for Community Information and Updates
MARC Code List for Languages
MARC Code List for Countries
MARC Code List for Geographic Areas
MARC Code Lists for Relators, Sources, Description Conventions MARC Code List for Organizations
MARC 21 Specifications for Record Structure, Character Sets, and Exchange Media All MARC standards
via Cataloger’s Desktop (online or CD-ROM) Understanding MARC Bibliographic (any edition, online or print)
Understanding MARC Authority Records (any edition, online or print)
MARC 21 Lite Bibliographic Format (online)
ArtMARC Sourcebook

The following questions pertain to a broad range cataloging resources that staff in your technical service/cataloging departments may or may not use.

25. Do you use another library's "cataloging toolkit" as a resource in your library, (e.g., another library's technical services webpage)?
   Yes
   No
   If yes, please list the URL, if known

26. Do you have your own internal suite/collection of cataloging tools?
   Yes, but it is not web-based
27. Does your cataloging/technical service staff use OCLC’s Bibliographic Formats and Standards? If yes, how often?
   Yes
   No
   If yes, please tell us how frequently

28. Does your cataloging/technical service staff use OCLC’s resources, such as their “Librarian’s Toolbox”? If yes, how often?
   Yes
   No
   If yes, please tell us how frequently

29. Does your cataloging/technical service staff use Amigos Agenda & OCLC Connection (AAOC)? If yes, how often?
   Yes
   No
   If yes, please tell us how frequently

30. Does your cataloging/technical service staff use any services or resources pertaining to cataloging offered by Amigos?
   Yes
   No
   If yes, please tell us how frequently

31. Does your cataloging/technical service staff use Library of Congress online catalog for any reason?
   Yes
   No
   If yes, please tell us how frequently

32. Does your cataloging/technical service staff use any other institution’s online catalog to assist in cataloging items for your library?
   Yes
   No
   If yes, please tell us how frequently

33. Do you provide access for your cataloging/technical service staff to any cataloging resources offered by any bibliographic vendor?
   Yes
   No
34. Does your library link to any resources (cataloging or other) offered by professional library and information science associations for use by cataloging/technical service staff?
   - American Library Association (ALA)
   - Association for Library Collections and Technical Services (ALCTS, a division of ALA)
   - Association for Library and Information Science Educators (ALISE)
   - International Federation of Library Associations (IFLA)
   - Library and Information Technology Association (LITA, a division of ALA)
   - Public Library Association (PLA, a division of ALA)
   - Special Libraries Association (SLA)
   - Texas Library Association (TLA)
   - Other

35. Does your library subscribe to any of the following journals (online or print) for use by the cataloging/technical service staff?
   - Advances in Serials Management
   - Cataloging and Classification Quarterly
   - Cataloging Service Bulletin
   - International Cataloguing and Bibliographic Control
   - Journal of the American Society for Information Science and Technology (JASIST)
   - Journal of Documentation
   - Journal of Internet Cataloging
   - Library Journal
   - Library Resources and Technical Services
   - Serials Librarian
   - Serials Review
   - Technical Services Quarterly
   - Union List of Serials
   - Others (please list)

36. Does your library provide access to any online reference tools for use by the cataloging staff?
   - Online dictionaries (e.g., YourDictionary.com)
   - Online encyclopedias (e.g., Wikipedia)
   - Resources for acronyms and abbreviations, etc.
   - The Cataloger Calculator
   - Other (please list)
37. Does your cataloging/technical service staff regularly use or refer to bibliographic guidelines and standards, or similar bibliographic documentation? For example, International Standard Bibliographic Description (ISBD), Functional Requirements for Bibliographic Records (FRBR), Program for Cooperative Cataloging (PCC), etc.?

   Yes
   No
   Occasionally
   Don’t know
   Other (please list)

38. Do any cataloging/technical service staff regularly monitor the literature and announcements coming from The Joint Steering Committee for Revision of the Anglo American Cataloguing Rules (e.g., *The Logical Structure of the Anglo-American Cataloguing Rules*)?

   Yes
   No
   Occasionally
   Don’t know

39. Have any of your cataloging/technical service staff read the *Functional Analysis of the MARC 21 Bibliographic and Holdings Format*?

   Yes
   No
   Occasionally
   Don’t know
40. Do any cataloging/technical service staff subscribe to any of the following ALA electronic discussion listservs?
Audiovisual (PLA)
Authority Control in the Online Environment (LITA/ALCTS)
Automated Acquisitions/In-Process Control Systems (ALCTS)
Circulation/Access Services (LAMA SASS)
Creative Ideas in Technical Services (ALCTS)
Digital Libraries Technologies (LITA)
Electronic Publishing/Electronic Journal (LITA)
Electronic Reserves (ACRL)
Electronic Resources (ALCTS)
Electronic Text Centers (ACRL)
Emerging Issues Program (PLA)
Emerging Technologies (LITA)
Heads of Library Technology (LITA)
Heads of Public Libraries/Services (ACRL)
Human/Machine Interface (LITA)
Human Resources (PLA)
Imagineering (LITA)
Interlibrary Cooperation (ASCLA ICAN)
Interlibrary Loan (RUSA MOUSS)
Internet Resources (LITA)
Library Consortia/Automated Systems (LITA)
Manuscripts and Other Formats (ACRL RBMS)
MARC for Special Collections (ACRL RBMS)
MARC Formats (LITA/ALCTS)
Open Source Systems (LITA)
Personnel Administrators and Staff Development Officers (ACRL)
Public Library Affiliates (PLA)
Public Library Districts (PLA)
Public Library-School Partnership (ALSC)
Publisher/Vendor Relations (ACRL STS)
Role of the Professional in Academic Research Technical Services (ALCTS)
Science and Technology Databases (ACRL STS)
Science and Technology Resources in Public Libraries (PLA)
Secure Systems and Services (LITA)
Serials Automation (LITA/ALCTS)
Technical Services in Public Libraries (ALCTS)
Technical Services Workstations (LITA/ALCTS)
41. Do any of your cataloging/technical service staff subscribe to and use the electronic discussion listserv AUTOCAT [an international cataloger listserv]?
   - Yes
   - No
   - Occasionally
   - Don’t know

42. Do any of your cataloging/technical service staff subscribe to or use any other electronic discussion listservs, (e.g., MARC) or Blogs (e.g., Catalogablog) that focus on cataloging and classification issues?
   - Yes
   - No
   - Occasionally
   - Don’t know

Please tell us about your Authority Control…

43. Does your library perform authority control on names and subject headings?
   - Yes
   - No

44. Does your library outsource authority control?
   - Yes
   - No

45. If you do maintain your own authority records do you use resources such as the Library of Congress Authorities database or OCLC’s authorities database? Please check all that apply.
   - We regularly refer to LC Authorities database.
   - We regularly refer to OCLC’s authorities database.
   - We use a combination of external authorities databases.
   - We use our own authorities database.
   - We do not use any authorities database.
   - NA
   If you use an alternate authorities database, please indicate the name.

46. If you maintain your own authority records do you participate in the name authority program component (NACO) of the Library of Congress’ Program for Cooperative Cataloging (PCC)?
   - Yes
   - No
   - NA
47. If you maintain your own authority records do you participate in the subject authority program component (SACO) of the Library of Congress’ Program for Cooperative Cataloging (PCC)?
   Yes
   No
   NA

48. If you have an authorities database, how often do you maintain the records?
   Weekly
   Monthly
   Occasionally
   NA
   Other (please specify)

Please tell us how you update your cataloging tools and resources

49. How are tools ordered? Check all that apply.
   ALA
   Amazon.com
   Library of Congress
   OCLC
   OPAC Vendors
   Publishers (e.g., Libraries Unlimited, Scarecrow Press, etc.)
   NA
   Other (please specify)

50. How are tools and resources reviewed for updates? Check all that apply.
   Yearly schedule update
   Consensus of staff or director
   1-6 months
   Occasionally
   Rarely
   Never (once acquired, never reviewed)
   Other (please specify)

51. Is your library on the Library of Congress list for updates?
   Yes
   No
   Don’t know

52. Do you use another source for updates?
   Yes
   No
   If yes, please specify
Please tell us about your training…

53. Do you have professional certification requirements that stipulate you obtain additional and/or regular training to do your job?
   - Yes
   - No
   - If yes, how often

54. How important to you is ongoing education/training in cataloging?
   - Very important
   - Important
   - Neutral
   - Not important
   - Not at all important

55. In the past two years, how frequently have you used these sources of training in the use of cataloging tools and resources? Please use a scale of 1 to 5 with 1 = Very frequently and 5 = Not at all.

   1  2  3  4  5

   Amigos
   Commercial providers (e.g., Skillpath)
   Commercial vendor
   Library Schools
   NTRLS
   Texas Education Agency
   TLA
   TSLAC
   In house training
   Other

56. What are the factors that affect the availability of cataloging resources and tools in the technical service/cataloging department. Please check all that apply.

   - Budget limitations
   - Staff limitations
   - Simply don’t know enough about tools and resources
   - Other (Please specify)

57. Do you feel that these limitations are detrimental to the service you provide to library patrons as far as providing them with a reliable catalog system is concerned?
   - Yes
   - No
   - Don’t know
58. What percentage of your in-house cataloging is copy cataloging?
   None
   10%
   11-30%
   31-50%
   51-70%
   71-80%
   81-99%
   100%

59. If you outsource records for cataloging, please indicate the reasons. Check all that apply.
   Centralized or co-operative cataloging with another library
   Lack of funding
   Lack of time
   Lack of qualified staff
   If other (please specify)

60. Do you outsource your bibliographic records to more than one vendor?
   Yes
   No
   Don't know

61. What percentage of your bibliographic records are outsourced?
   None
   10%
   11-30%
   31-50%
   51-70%
   71-80%
   81-99%
   100%

62. Are the outsourced bibliographic records reviewed in-house BEFORE the library catalog is updated?
   Yes
   No
   Sometimes
   If sometimes, please specify the criteria to update ______________

63. Are the outsourced bibliographic records reviewed in-house AFTER the library catalog is updated?
   Yes
   No
   Sometimes
   If sometimes, please specify the criteria to update ______________

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64. If you review outsourced bibliographic records in-house AFTER the library catalog is updated and you must modify the records, please indicate the frequency.
   Need continual modification
   Need frequent modification
   Need occasional modification
   Never needs modification
   Other (please specify)

65. If you modify outsourced bibliographic records AFTER the library catalog is updated, please tell us why they are modified. Check all that apply.
   To enter local information/local numbers
   To correct data
   Holdings information
   Other (please specify)

66. Do you feel that regardless of whether you do or do not do your own cataloging (i.e., your library outsources its records) that your cataloging/technical service department should have access to many of the cataloging tools and resources discussed in this survey?
   Yes
   No
   Don’t know

67. Are there any practices or tools and resources (e.g., in-house or local) not addressed by this survey? Please specify in the space below.
Part II  Follow-up Interviews

A random sample of 10-15 respondents will be identified for interviews. Semi-structured interviews of up to one hour in length will allow for further exploration of the resulting survey data. The survey responses will provide the foundation for the follow-up interview by the researchers where clarification and expansion of details, as it pertains to the study, is possible.

Interview Questions

Thank you for agreeing to participate in this research study and for completing the CTR-NT Survey. With your agreement we will record our discussion with a digital audio recorder so we can concentrate on our discussion without the distraction of note taking and to avoid the chance we may miss some important issues. The recording of the interview will be transcribed and you will be provided a copy of the transcription. All answers are considered confidential and your identity will not be disclosed.

1. Did the survey make you more aware of what cataloging tools and resources you did or did not have in your library?
2. Did you feel the survey sufficiently covered the types of tools and resources available to catalogers?
3. What sort of cataloging training, in general, have you or your staff received? Do you feel this training included a good introduction to the types of tools and resources addressed in the survey?
4. Do you think it would be beneficial to have a standardized list of recommended tools and resources that any cataloging/technical services department could use as a guide?
5. Are there any issues raised by the survey that you would like to further comment on?

Depending on the results of the survey we may ask questions that pertain to some of the free-responses to the survey questions. For example, question 56 asks about factors that affect the availability of cataloging resources and tools in the technical service/cataloging department and allows the respondents to give “other” reasons.
Part III Focus Groups

Two focus groups will be held at the Texas Library Association Annual Conference, April 5-8, in Austin, Texas. We have received permission to hold the two sessions on Thursday, April 7th, from 10-10:50am and 11-11:50am. As current Chair of the Texas Regional Group of Catalogers and Classifiers (TRGCC), a TLA round table, I am in the position to request that catalogers and library administrators consider attending one of these two sessions.

The focus groups will primarily address the results of the survey in order to shed light on the quantitative data. We will present to them our preliminary findings and ask them to comment on the results. The two questions below are broad enough to instigate a general 1 hour discussion.

Preliminary Questions:

1. Does the data we have collected surprise you at all? In other words, do you feel it is a fair representation of the current state of cataloging tools and resources in cataloging/technical service libraries?
2. Do you think it would be beneficial to have a standardized list of recommended tools and resources that any cataloging/technical services department could use as a guide?
Appendix A   Invitation Letter to Public Library Director

Dear_______

We are writing to ask you to participate in an important survey that addresses the extent and utilization of cataloging tools and resources by technical service staff in North Texas public libraries. This study is funded by a grant from the OCLC/ALISE Library and Information Science Research Grant Program (LISRG).

Shortly, you will receive an e-mail with a link to our survey. Please be assured that your participation in this study is voluntary and that you may stop at any time. You give your consent by completing the survey. No individual responses will be reported to anyone because data will be reported only on a group basis. Even if you do not perform cataloging in your library, we still ask that you or someone from your technical service staff complete the survey. To ensure survey validity and consistency, we ask that you complete and submit only one survey per library. The survey is set up to allow you to exit at any time and reenter at the point you left off, up to submission or the survey end date of March XX, 2005.

This study will not address or question the quality of any cataloging work performed in your library. The amount and quality of training and education possessed by those who download, enhance, distribute, or create these records is not in question, although we will ask you some basic questions concerning the type of training you or your staff have received. In essence, this survey seeks only to document the reality of the cataloging process where cataloging tools and resources are concerned.

Once the surveys are completed and returned, we may ask you to participate in a follow-up interview to enhance further the data we receive. As well, we will be conducting two focus group sessions at the Texas Library Association Annual Conference in Austin, Texas. The sessions will take place on April 7 starting at 10am. We will distribute more information about the location of the sessions once the conference has begun. We hope you will consider joining us to discuss the overall results of the survey.

If you have any questions, please feel free to contact us or to visit the project website at http://courses.unt.edu/smiksa/Projects/CTRNT_index.htm

Shawne D. Miksa, Ph.D.
Toby Faber, Research Assistant
Barbara Schultz-Jones, Research Assistant

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(940) 565-3101 fax
Dear_______

On February XX, 2005 we wrote to ask you to participate in an important survey that addresses the extent and utilization of cataloging tools and resources by technical service staff in North Texas public libraries. The study is funded by a grant from the OCLC/ALISE Library and Information Science Research Grant Program (LISRG).

This e-mail provides you with the link to our survey at: http://

Again, please be assured that your participation in this study is voluntary and that you may stop at any time. You give your consent by completing the survey. No individual responses will be reported to anyone because data will be reported only on a group basis. Even if you do not perform cataloging in your library, we still ask that you or someone from your technical service staff complete the survey. To ensure survey validity and consistency, we ask that you complete and submit only one survey per library. The survey is set up to allow you to exit at any time and reenter at the point you left off up to submission or the survey end date of March XX, 2005.

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Appendix C   Email Follow up

Dear______

On March xx, 2005 we emailed you with the link to an important survey that addresses the extent and utilization of cataloging tools and resources by technical service staff in North Texas public libraries. This is a study funded by a grant from the OCLC/ALISE Library and Information Science Research Grant Program (LISRG).

The survey is available at: http://
If you have already completed and submitted the survey, please disregard this letter and accept our thanks for participating.

This email is simply a follow-up and we urge you to consider the survey’s importance. Please be assured that your participation in this study is voluntary and that you may stop at any time. You give your consent by completing the survey. No individual responses will be reported to anyone because data will be reported only on a group basis. Even if you do not perform cataloging in your library, we still ask that you or someone from your technical service staff complete the survey. To ensure survey validity and consistency, we ask that you complete and submit only one survey per library. The survey is set up to allow you to exit at any time and reenter at the point you left off up to submission or the survey end date of March XX, 2005.

This study will not address or question the quality of any cataloging work performed in your library. The amount and quality of training and education possessed by those who download, enhance, distribute, or create these records is not in question, although we will ask you some basic questions concerning the type of training you or your staff have received. In essence, this survey seeks only to document the reality of the cataloging process where cataloging tools and resources are concerned.

Once the surveys are completed and returned, we may ask you to participate in a follow-up interview to enhance further the data we receive. As well, we will be conducting two focus group sessions at the Texas Library Association Annual Conference in Austin, Texas. The sessions will take place on April 7 starting at 10am. We will distribute more information about the location of the sessions once the conference has begun. We hope you will consider joining us to discuss the overall results of the survey.

If you have any questions, please feel free to contact us or to visit the project website at http://courses.unt.edu/smiksa/Projects/CTRNT_index.htm

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