Report to The Government of British Columbia and

The Library Development Commission of British Columbia from

The First Provincial Conference on Catalogue Systems

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The First Provincial Conference on Catalogue Systems

prepared by

R. W. MacDonald Conference Coordinator

VANCOUVER, BRITISH COLUMBIA DECEMBER, 1974

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PREAMBLE

This report will serve as a brief record of the First Provincial Conference on Catalogue Systems, while at the same time providing some specific recommendations for the Government and the Library Development Commission to consider.

The list of recommendations, developed by the Conference Coordinating Committee and circulated to conference contacts as a questionnaire, received decisive support from the questionnaire returns. The first two recommendations emanated from the conference directly, but were included in the questionnaire to confirm the intent and wording of resolutions developed from the floor.

An expression of urgency for catalogue support pervaded the conference discussions and I hope this will not go unheeded. The time for action is now, and I believe the recommendations and comments in this report will provide a basis for action.

Respectfully submitted,

R. W. MacDonald Conference Coordinator

1. LIST OF RECOMMENDATIONS

A list of ten recommendations follow. These recommendations were initially developed in the form of a questionnaire, discussed by the coordinating committee, then circulated to all conference contacts.

A tabulation of questionnaire returns appears in section 5 and questionnaire comments in appendix V.

Recommendation #1 concerning: the appointment of a coordinator

Resolved that the Library Development Commission should take immediate action to appoint a coordinator for catalogue systems development. That the coordinator be assigned responsibility for developing a proposal for implementing a system to provide catalogue support services for libraries within the Province of British Columbia. Such system to utilize current computer technology and be compatible with other catalogue system developments, both Nationally and with other Regional or Provincial systems.

the intent of this resolution is to obtain a qualified individual who can, working independently, develop a proposal for a catalogue support system, including a budget and implementation plan. Emphasis must be placed on expediting this task, to enable some implementation of a system as soon as is reasonably possible. It has been suggested that the time from appointment of the coordinator to implementation of a system should be on the order of six months.

Recommendation #2 concerning: priority for initial developments

Resolved that a high priority be assigned to implementing a catalogue support system as an initial stage of development towards a province-wide catalogue system. Such catalogue support system should be developed initially as a batch processed system, but would eventually be operated as an on-line system. The main requirement for initiating a batch system is to enable a service to be implemented within 6 months of hiring a coordinator. If an on-line system can be introduced within this sort of time frame, this would be a preferred alternative. The system should be similar in objective and scope to those demonstrated at the conference; the Ohio College Library Center, Ontario University Library's Cooperative System, and the Washington Library Network. Consideration should be given to acquiring such a system by purchase or lease, as opposed to developing a new system.

the planning and development of complex information systems such as Library Catalogue Systems generally requires the implemention of features of the system in stages. There are a number of arguments for adopting this approach, but two significant reasons in this instance are;

(a) a logical initial component of an eventual province-wide system is the catalogue support service similar to that already provided by the systems demonstrated at the conference.

(b) the expression of urgent need for such services by a number of different libraries at the conference, indicates this should be the first stage of development.

Recommendation #3 concerning: political and other conflicts

Resolved that a directing council be established as soon as possible, to ensure that adequate consultation and communication is maintained among the various Government agencies and Library systems, and to provide management direction over fiscal and other administrative matters related to the funding, policies, objectives and responsibilities of projects, systems development, or system operations.

Libraries in the Province of B.C. are divided into distinct groups according to fiscal and organizational influences, determined by such factors as; division of responsibility between two Ministries within the Government, division of College Libraries and University Libraries, the independent operation of the many Public Library Systems managed by separate and independent City or Municipal bodies, independent operation of the many School Libraries in the Province managed by separate School Boards and Civic bodies, and many independent Government libraries. The establishing of a new Directing Council to provide representation for all of the various Libraries and organizations which would be affected seems a reasonable course of action. This approach becomes particularly attractive if a new and separate operational entity is ever established for implementing new systems and services, such as a Crown Corporation.

Recommendation #4 concerning: long term objectives

Resolved that any planning and development for catalogue systems must be based upon a concept of province-wide systems, comprising a centralization of information in a standardized format, with decentralized access and/or information products/services provided to meet the needs of individuals as library users and the composite needs of the libraries in the province.

the concept of province-wide systems is considered to be of prime importance for two major reasons; to reduce the redundant intellectual effort and clerical effort resulting from duplicative systems, and to provide a basis for an information system *among* libraries as well as *for* individual library collections. The effective sharing of resources, that of collections or the money spent on collections and services, is extremely difficult with existing systems and unsatisfactory in terms of satisfying library patron needs. A province-wide system should ultimately provide a user with an ability to determine quickly and easily the availability of information resources to meet a specific need, including the immediate physical availability in terms of items being on loan or otherwise unavailable. Availability is of course subject to whatever lending or other

restrictions which may be necessary to allow the owning library to meet the needs of its primary borrowers.

Recommendation #5 concerning: Union Catalogue requirements

Resolved that a Union Catalogue capability must be considered a necessary adjunct to any catalogue support system, again in the context of a long term objective of a province-wide catalogue system. Such Union Catalogue capability must permit the eventual production of catalogues for individual libraries and for groups of libraries in printed book form or on Computer Output Microform (COM), as a replacement for or augmentation of card catalogues. Also the system should be compatible with the National Union Catalogue, and any developments which occur in that connection.

separate mention is made of Union Catalogue requirements because with the prospect of cataloguing support as an early implementation stage, the building of union holdings information should be clearly included as a concurrent objective. A primary reason is of course to be able to maintain library catalogues using alternatives to card catalogues, to obtain the significant benefits some of these alternatives can provide, such as; reduced costs, improved services enabled by having catalogues at many access points, improved ability to share resources between library systems, and so on.

Recommendation #6 concerning: organization structure for systems operations

Resolved that consideration be given to establishing a new organizational entity preferably a Crown Corporation, comprising a Board of Directors, Executive Director, and Library Systems Professionals, with the objective of establishing and maintaining specialized information systems for the Libraries within the Province of British Columbia. Such Corporation should be essentially a not-for-profit organization basically self-supporting in the context of charging users for services provided on a cost recovery basis. Some initial funding will be required to finance start-up costs and to enable capital and other development expenditures to be charged to users over an extended period of time.

there does not appear to be any one organization without some significant vested interest which may result in some difficulty or bias in approaching the tasks of determining the requirements for and developing catalogue systems for a composite set of needs for libraries in the Province. It is therefore suggested that a separate entity, newly formed, and with adequate representation from all of the various libraries and organizations affected, is a better alternative than using an existing organization. The Directing Council, included in another recommendation, should be considered as the best prospective group to form the Board of Directors for such an organization.

Recommendation #7 concerning: standards and consistency

Resolved that steps should be taken as soon as possible to initiate studies of authority control methods as applied to computer-based catalogue systems with a view to implementing authority controls with a prospective catalogue system as soon as reasonably possible. Also that the need for formal adoption of several bibliographic standards should be examined in this study, to determine which standards can and should apply to a Province-wide catalogue system.

the long established traditional methods used for maintaining library catalogues are heavily dependent upon the concepts of using authority systems to obtain consistency in assigned headings for names and subjects, and upon the formalized rules embodied in cataloguing standards to obtain consistency and conformity in bibliographic content. Not surprisingly, the current focus of machine-based catalogue systems is emphasizing the use of authority methodology. The use of the Anglo American Cataloguing Rules (AACR) is accepted standard for most libraries on this continent, and is clearly a National Standard. The same situation applys to the International Standard Bibliographic Description formats, ISBD-M for Monographs and ISBD-S for Serials. The application of standard number schemes is also evident; of ISBN for books, and ISSN for serial publications.

Recommendation #8 concerning: conformity and compatibility with other computer-based systems

Resolved that any Provincial or Regional catalogue system development must be functionally compatible with other Regional, Provincial or National systems, in order that the existing inter-library cooperative arrangements are sustained. Also that the benefits to be obtained from sharing information resources by exchanging machine readable data files, demands that the existing standards for information interchange be adopted for all external operations of obtaining data from another source or of reporting or providing data to another location.

existing and planned developments for catalogue systems on the varying levels of National, Regional, Provincial or International, cannot be ignored. The interdependence of libraries demands that a basic compatibility between systems be maintained, even strengthened, and the requirements for compatibility between computer-based systems in particular demands that recognition and support be provided for processing and producing bibliographic records in the MARC formats. The advantages to be gained are significant, such as the opportunity for obtaining bibliographic data in machine-readable form at relatively nominal cost, compared with the considerable cost of creating records independently. If full MARC bibliographic records are not feasible then it is important to adopt a lesser standard, such as the mini-MARC format as suggested by the National Library of Canada. Whatever formats are used, the

available standard number schemes; ISBN and ISSN, or bibliography numbers: should be incorporated as a useful "common denominator" among systems.

Recommendation #9 concerning: representation for School Libraries

Resolved that the Library Development Commission and the Department of Education immediately take steps to determine a means for obtaining adequate representation for School Library Systems on the Directing Council and/or the Board of Directors of a new Crown Corporation. Such representation being based on some rational selection process satisfactory to the School Systems, B.C. Teachers Federation, and Government.

special mention is made of the need for representation of School Libraries, because of the apparent absence of any distinct and obvious representative body or bodies. This was a particular concern for the Coordinating Committee when planning the First Provincial Conference on Catalogue Systems, and from the comments during the conference, there was not adequate representation.

Recommendation #10 concerning: a second conference on catalogue systems

Resolved that a second Provincial conference on catalogue systems should be planned for the summer of 1975, to provide information on the progress of catalogue support systems, and to enable continued discussion and presentations, on a in-depth level, of the technicalities and priorities for future developments.

the opportunity to meet and discuss catalogue systems as a followup to the first conference, would accomplish two objectives;

- (a) provide an opportunity to review progress or lack of progress
- (b) enable open discussion of requirements for present and future requirements.

2. COMMENTS ON PROVINCE-WIDE CATALOGUE SYSTEMS

The expression of need for a catalogue support system, which emanated from the conference, addresses one aspect of catalogues which can be developed on a province-wide basis. It represents also what appears to be an important, perhaps to critical, and logical first step in any new development of catalogue systems.

Those systems demonstrated at the conference were all primarily catalogue support systems, which explains in part at least, the emphasis on this aspect of library catalogues. In addition, the everyday business of maintaining a library catalogue is a problem to some extent for every library, and it is therefore understandable that any new development which will provide some relief for this would be of immediate interest to the conference participants.

Yet there is a need to examine library catalogues other than simply dealing with day-to-day operational problems. There is a need to look beyond the scope of each individual library catalogue and in this context it is worthwhile examining and questioning some of the basics of present-day systems.

Traditional library card catalogues, even adaptations of these catalogues to computer-produced book catalogues, are essentially based upon a concept of separate and distinct systems. Separate in physical form, and distinct in terms of each system having at least one set of rules and standards to follow.

Each library adopts a set of rules and standards for its catalogue, generally choosing a formula for the particular library from the available cataloguing and classification standards. Once this choice is made, it establishes a committment which must be followed to maintain consistency in the catalogue. Within this selection of standards, there are inevitably variations which occur between libraries using the same standard, due to interpretation of the standard, or differences in implementation.

This is not to say that libraries do not follow standards, nor that wide variations exist among library catalogues, but simply to establish one apparent fact; that each library's catalogue is to some extent unique.

A complement to this structure of separate and distinct catalogues has been the traditional "Union Catalogue", which has been proposed for British Columbia before ^{1,2}, and is recommended again in the list of recommendations of this report. However, in looking at the concept of Union Catalogues as they usually exist today, the term catalogue must be qualified. A Union Catalogue is generally a composite of a number of separate library catalogues, based on a merging of contributed catalogue entries using a selected and limited access method. Typically, the access method is based on the main entry, or alternately title may be used. The traditional Union Catalogue differs from most library catalogues in at least two very basic aspects; there is not one set of rules but rather a merging of many, and there is little or no "authority", i.e. control, imposed over entries introduced to the file. The lack of authority is to some extent imposed by the difficulty of establishing a definitive set of rules to follow. Further, the basic purpose of Union Catalogues is generally different from that for a library catalogue, usually limited to determining location information for a known item. This is also an important function for a library catalogue, but is only one of the purposes, and there are very few true catalogues restricted to this purpose.

The foregoing is not intended to condemn the existing policies and practices, but to clarify the existing situation prior to posing some questions and alternatives. Further, it must be recognized that the existing situation is not a matter of design but of necessity, mainly due to limitations of using manual card catalogues for diverse, decentralized library systems.

¹Programme for Library Development in the Province of British Columbia. The British Columbia Library Development Commission. Victoria, British Columbia. September, 1973.

In considering alternatives, particularly with a prospect of using computer-based systems, libraries should look to finding methods for obtaining better catalogues and not simply another method for continuing the practices of existing catalogues.

To start with a very basic issue, why does each library need to have a unique catalogue? Surely, there is a need for a catalogue of each library collection, and that catalogue must satisfy the needs of the library and its users, but is there really much difference between libraries in the need for an index to the collection?

And what about the price of being unique? Can libraries afford to continue spending scarce resources to maintain each catalogue according to a unique set of existing rules and standards without carefully considering the alternative of moving at least towards a reduction in the number of standards?

Related to this, is the use of already available catalogue information to maintain a catalogue, and the modification which occurs in order to 'fit' the existing unique catalogue authority. The savings to be realized by accepting the available information with minimum modification must be considered against the high cost of adapting shared copy to unique rules and standards.

In addition to the concern about the cost of maintaining the catalogue, there must also be concern about the effectiveness of library catalogues, particularly in the area of shared use of collections and rationalization in the development of collections. The need for information about library holdings *among* libraries is perhaps more critical today than it ever has been. Every library is faced with the prospect of diminishing book budgets due to the spiralling costs of operating a library, and it is doubtful if any library can hope to be completely self-sufficient in the terms of having adequate collections to satisfy its users without relying on other libraries.

Improvements can also be made to services within each library system by providing increased accessibility to catalogues such as obtained with book catalogues placed at strategic points. There are other methods for providing decentralized access, through published catalogues on COM or by direct communication to a central computer.

The limited role usually intended for Union Catalogues (of determing locations of known items) should surely be expanded at least to include catalogue support, but why not expanded to the full capabilities of each library's catalogue?

The capability for centralizing catalogue information and coping with a complexity of cataloguing data for many libraries is obtainable with a computer-based catalogue. A central file can be used to generate various catalogue products including a catalogue for a particular library, or a catalogue for a group of libraries, or for all public libraries in the Province.

Proceeding from the present to a future goal of a Province-wide catalogue is obviously easier said than done, but however futuristic this concept might appear, it is nevertheless a goal which can be supported with today's technology, given sufficient funds to effect the development and implementation.

To risk a prediction based on evidence of recent cost trends; it is likely that the cost of maintaining card catalogues will be greater than the costs of computer-based alternatives within the next ten years. It is more likely this will occur sooner than

²A Proposal for Province-wide Organization of Library Services in British Columbia. British Columbia Library Development Commission, Committee on Library Development, Victoria, British Columbia. December, 1971.

later, indeed for *some aspects* of catalogue systems maintenance for *some libraries*, the alternatives are already less costly.

It would appear reasonable therefore to suggest that a study should be initiated to determine the feasibility of the concept of centralizing information for a province-wide catalogue system. If a study is undertaken however, it need not delay the implementation of a catalogue support system because the selection of a system for catalogue support would have to be reasonably open-ended at any rate, to permit the eventual development or modification for extending the system to include additional functions.

A study of the feasibility of merging many catalogues into one system would be expected to define the requirements for or alternatives to the integration of authority files for personal and corporate names, subject heading systems, and related cross references. Variances in classification schedules would also need to be examined if there was any intent to use classification as a means for subject access.

There are of course a number of different standards extant in the many catalogues in the province and it may be necessary to approach the problem dealing with groups of libraries, perhaps by type of library. This should not be predetermined however, because despite the different practices or standards used between, say Academic and Public Libraries, there is a growing population of common users; and it would be beneficial to avoid any unnecessary distinctions by type of library.

As a preliminary projection of probable needs, the following standards are likely required, as a minimum;

- (a) For subject headings
 - Library of Congress Subject Headings
 - Sears Subject Headings
 - National Library of Medicine Subject Headings
- (b) For Classification Systems
 - Library of Congress Subject Classifications
 - Dewey Decimal Classification
 - National Library of Medicine Subject Classification
- (c) For Personal and Corporate Name, Series Headings
 - Anglo American Cataloguing Rules

From this it is obvious that any Province-wide system will of necessity be complex, and will require a considerable study and discussion. Further it is inevitable that many libraries, perhaps most, will be faced with accepting some significant compromises in departing from existing practices.

The potential benefits must however, be weighed against any compromises which are necessary, and there appear to be many potential benefits. It is not possible to decide if such a concept is feasible without examing all of the factors, and as suggested earlier, libraries should look to finding methods for obtaining better catalogues and not simply another method for continuing existing catalogues.

3. NEED FOR PROVINCIAL COORDINATION

The proposal which initiated the Conference, prepared and submitted to the Government by the Tri-University Libraries organization TRIUL, suggested a need to "determine and coordinate an overall plan for a Provincial Catalogue System".

This need was expressed mainly because of a concern that there is in fact an immediate need for new development, and if some coordinated plan is not determined there are libraries which will be forced to begin individual development. Those libraries already involved in pursuing some studies of new developments for catalogue systems include the three University libraries, the Greater Victoria Public Library, and from the Conference it was announced there is a plan emerging for the Provincial Government Libraries.

In addition there are two Regional Libraries that already have a computer-based catalogue system; the Vancouver Island Regional Library, and the Okanagan Regional Library. There were indications from the conference that others are also concerned about immediate alternatives.

The University of British Columbia Library has been studying the requirements for alternatives to card catalogues, and is well along in identifying some of the basic requirements. Since the Conference, the University of British Columbia Librarian, Mr. Basil Stuart-Stubbs, has agreed to alter the immediate intent of this study project to recognize a preference for a Provincial development rather than UBC going alone. This holding position cannot be maintained indefinitely however, and if there is no action on a Provincial scheme, then UBC will eventually be forced to pursue an alternative to card catalogues, either separately or within TRIUL.

The Simon Fraser University Library is also very seriously investigating a catalogue support system, specifically the Ohio College Library Center (OCLC) system (see appendix IV). The advantages to SFU from using the OCLC system are substantial, and the Librarian indicates they are studying the feasibility of implementing this connection early in 1975. They have agreed however, to hold off any committment to OCLC for a short time to allow the Government to respond to the recommendations for immediate action towards implementing a catalogue support system for the Province.

There simply has not been time to obtain details or to discuss with other libraries, plans being considered, but it is clear that unless direction and coordination is provided by the Government, a considerable amount of public money is going to be spent on many different catalogue developments. The advantages to consolidating some of this expenditure and effort are obvious.

4. COMMENTS ON ACQUIRING A SYSTEM

The suggestion to acquire a system as opposed to designing and developing a system, can be supported with a number of valid arguments, but the two most significant are cost and time. It should in the long run cost less to acquire an available package than to undertake new development. Also, assuming a choice can be made

within a reasonable period of time, use of an available package will allow a service to be implemented much sooner than if new development occurs.

There are other arguments which apply, including the advantage of being able to acquire something which can be defined and evaluated. Whereas a new system can be defined but cannot be evaluated until it is developed and operational.

Yet there are pitfalls also in pursuing this approach, and it is worthwhile identifying some of these. First, is the reality that whatever is acquired, it will not be a 'completed' package. Virtually all library systems are subject to some developmental change over time, and for most computer-based systems this factor must be placed on the list of important points to evaluate because all of the existing systems are of recent design/development.

An important aspect of developmental change concerns the way in which changes occur; in what order of sequence, at what time intervals, who is responsible, and what "user's" influence can be expected.

And perhaps the most important aspect of change; what changes will occur. It would be foolish to acquire a system where no changes were anticipated or possible, unless the acquisition can be written-off in a short period of time, and even then this approach should be questioned.

The acquisition of any package must be subjected to many evaluations, but the decision must also be subject to some policy considerations. If the premise is accepted that any package acquired will not be complete, then consideration must be given to deciding how design and development for changes will be influenced and controlled. The best arrangement might be to undertake a partnership approach, assuming responsibility for some aspects of design and development or maintenance.

Without attempting to list all of the systems which can be investigated with a view to either using available services or to acquire systems by lease, purchase or whatever, it is not difficult to obtain a brief list of systems. A list follows, not intending to be comprehensive but only to indicate the range of possible choices, and the difficulties to be expected in making a selection. The list is not in any particular order, and some systems may in fact not be available.

Ohio College Library Center, OCLC, on-line catalogue system.

University of Toronto, CATTS system (used by Ontario University Libraries Cooperative System, OULCS), on-line system.

Washington Library Network, batch catalogue system.

National Library of Canada, MINIMARC system — proposed availability for mid 1975 — batch catalogue system.

Stanford University, BALLOTS, on-line catalogue system.

Richard Abel & Co., batch catalogue system.

Computer Aided Processing & Terminal Access Information Network CAPTAIN, New Jersey, on-line catalogue system.

Inforonics, on-line catalogue system.

System Development Corporation, on-line catalogue system.

New York Public Library, batch catalogue system.

Information Dynamics Corp., BIBNET, on-line catalogue system.

There are undoubtedly others to consider, and some of the above may not in fact be suitable for consideration. The point of this is that there are a number of systems which can be evaluated, that this evaluation is complex, and there is more to this process than simply selecting a system and implementing it.

5. SUMMARY OF QUESTIONNAIRE SURVEY

The questionnaire survey was undertaken to determine if a list of recommendations developed and discussed by the Conference Coordinating Committee was acceptable to the Libraries of the Province.

One hundred and eight questionnaires were circulated and thirty-five were returned. Although this is not a high proportion of returns, the response in favour of the recommendations was clear and definite; all obtaining more than 90% support. Also, an omnibus return was received from Simon Fraser which summarized responses for a number of participants, and in addition, individual responses were not provided by all of the University of British Columbia participants (although there is a consensus supporting the recommendations).

Supporting	Disagree	% Supporting
33	1	97.0%
34	1	97.1
30	3	90.9
33	2	94.2
34	1	97.1
28	3	90.3
33	2	94.2
35	0	100.0
33	2	94.2
33	1	97.0
	33 34 30 33 34 28 33 35 33	33 1 34 1 30 3 33 2 34 1 28 3 33 2 35 0 33 2

6. BRIEF NOTES ON CONFERENCE

The date and location of October 25 in Vancouver, was chosen to coincide with the Fall meeting of the British Columbia Library Association. This was helpful in two ways, by providing increased incentive to attend and by the assistance provided by the BCLA in arranging for meeting facilities. Their assistance is gratefully acknowledged.

Recorded attendance totalled 96, with good representation from most libraries in the Province. A list of attendees is included in appendix II. A number of others

contacted about the conference did not attend because of prior commitments, which in part can be attributed to the brief notice available from invitation to conference date.

A Coordinating Committee provided valuable assistance in developing the Conference Program and determining an invitation list. Members of the committee included, Mr. Ross Carter, Mrs. Joan Mitchell, and Mr. Peter Simmons. Their assistance helped to make the conference a success.

Special mention must be made of the speakers for the conference, Fred Kilgour, Ralph Stierwalt, Mary Jane Reed, and Roy Stokes. They each responded enthusiastically to a request to speak, and their presentations were all excellent and informative.

A transcript of the prepared presentations will be available separately, early in 1975. It is doubtful if the discussion session can be transcribed since the recording is not sufficiently clear, because many speakers did not address the microphones properly.

Funding for the Conference was provided by the Provincial Secretary, the Honourable Ernest Hall, and arranged through the Library Development Commission.

FIRST PROVINCIAL CONFERENCE ON CATALOGUE SYSTEMS

October 25, 1974.

Appendix I

Sponsored by

The Library Development Commission of British Columbia

and Tri-University Libraries

under the authority of

The Provincial Secretary of the Province of British Columbia

Location: Hyatt Regency Hotel, 655 Burrard Street, Vancouver, B. C. Plaza convention facilities

Program:

Vancouver, B.C.

9:00 introduction, R. W. MacDonald

9:15 catalogue systems of the Ohio College Library Center, Columbus Ohio Mr. Fred Kilgour, Director, Ohio College Library Center

10:00 coffee

10:30 catalogue systems of the Ontario University Libraries Cooperative System Mr. Ralph Stierwalt, Director, Office of Library Coordination, Council of Ontario Universities

developments for the Washington Library Network 11:15 Ms. Mary Jane Reed, Associate State Librarian for Research and Planning, Washington State Library

12:00 luncheon (Plaza West)

demonstrations and exhibits (Plaza East) 1:00

> Ohio College Library Center Ontario University Libraries Cooperative System Washington Library Network Richard Abel & Co.

2:30 arguments for coordinated development in British Columbia Mr. Roy Stokes, Director, School of Librarianship University of British Columbia

3:15 general discussion session

Moderator: Mr. Peter Simmons, UBC School of Librarianship

Panelists: Mr. R. L. Davison, Director, Library Development Commission Government of British Columbia

> Mr. Roy Stokes, Director, School of Librarianship, University of British Columbia Consultant to the Academic Board, College Library and Media Services Study Committee

Mr. Basil Stuart-Stubbs, University Librarian, University of British Columbia Member of Librarian Council Tri-University Libraries (TRIUL) Chairman, National Library Task Group on the National Union Catalogue

4:30 end of conference

> Coordinator: R. MacDonald, University of B.C. Library, Vancouver, B.C. V6T 1W5 Phone: 228-3101

LIST OF CONFERENCE ATTENDEES

Appendix II

Mr. D. Affleck

Capilano College Library

Ms. Marian Alexander

Western Washington State College Library

Mr. Aschenborn

South Africa State Library

Mr. John E. Backhouse
Prince George Public Library

Mr. Bryan Bacon

Burnaby Public Library Library

Ms. Judith Baeckmann
North Central Interior Library System Committee

Mr. D. A. Baird

Simon Fraser University Library

Mr. Paul Baldwin

Simon Fraser University
Library

Mr. Roger Behn

Thompson-Nicola Library System
Board of Management

Mr. I. F. Bell

University of British Columbia Library

Mrs. M. Beloff

Columbia Junior College Library

Mrs. Lois Bewley

University of British Columbia School of Librarianship

Mr. Robin Braithwaite

University of Toronto
Library Automation Systems

Mr. Doug Bridges

Malaspina College Library

Mr. G. R. Campbell

University of Victoria Library

Ms. Goldie Carr

Prince George Public Library

Mr. Ross Carter

Vancouver City College Library Mr. Phillip Chiddell

Camosun College Library

Mrs. Elspeth Croll

City of North Vancouver Public Library
Library

Mrs. Rosemary Cunningham

College Library and Media Services Study Committee

Mr. R.L. Davison

Library Development Commission Victoria

Ms. Helen Dickinson

North Vancouver District Public Library

Mr. T. C. Dobb

Simon Fraser University Library

Miss Garry Dobbin

University of British Columbia Library - Systems

Mr. Roddy Duchesne

National Library of Canada Research and Planning Branch - Networks

Mr. J. McRee Elrod

University of British Columbia Library

Mr. Hans J. Fadum

Notre Dame University of Nelson Library

Dr. R. Farris

Government of British Columbia
Department of Education

Mr. Al Fraser

Camosun College Library

Mrs. K. Freer

Vancouver Public Library Library

Mr. Ken Frost

Council of Ontario Universities
Office of Library Coordination

Mr. Aylmer Gloer

Okanagan Regional College Library

Ms. Helen Gordon

Library Development Commission East Kootenay Branch

Mrs. James (Korky) Grant

Chetwynd Public Library Association
Peace River Associated Libraries

Mr. Erik Green

Universities Council of British Columbia

Dr. Ronald Hagler

University of British Columbia School of Librarianship

Mr. Dean W. Halliwell

University of Victoria Library

Ms. Betty Hanafi

Fraser Valley College Library

Mr. Robert Harris

British Columbia Medical Centre Library

Miss Margaret Hastings

Government of British Columbia Legislative Library

Mrs. Sandra Heal

Okanagon Regional Library System Library Board

Mr. Bryan Husband

College of New Caledonia Library

Ms. Judy Inouye

Cariboo College

Mr. Ross Jewell

Simon Fraser University
Library

Ms. Jeannette Keays

Simon Fraser University Library

Dr. J. Kennedy

University of British Columbia Computing Centre

Mrs. T.A. Kennedy

Vancouver Public Library Library Board

Mr. Fred Kilgour

Ohio College Library Center

Mr. John Knapp

Richard Abel & Co.
Library System Services

Mr. Douglas Kunkel

Washington State University
Data Processing Center

Ms. Mary Leask

Library Development Commission
Kootenay Library System Committee (Consultant)

Mr. Peter Lofts

Okanagan Regional Library System
Library

Mr. R. W. MacDonald

University of British Columbia Library

Mr. Charles MacDonald

Simon Fraser University Library

Mr. John Mansbridge

Selkirk College Library

C. McAdam

British Columbia Institute of Technology Library

Mr. Doug McInnes

University of British Columbia Library

Mr. Donald W. Miller

Greater Victoria Public Library

Mrs. Joan Mitchell

Library Development Commission Victoria

Mr. J. G. Mitchell

Government of British Columbia Legislative Library

Mr. Michael G. Moen

Richard Abel & Co

Ms. Jean Molson

British Columbia Medical Centre

Mrs. Barbara Nelson

Greater Victoria Public Library

Mr. Harry E. Newsom

Thompson-Nicola Library System Library

Mr. Jim O'Hare

Library Development Commission
Dawson Creek

Mr. T. B. O'Neil

Vancouver Public Library Library

Mrs. Marilyn Parsons

Greater Vancouver Library Council
Board of Directors

Mr. G. Pincott

Vancouver Public Library

Mrs. Anne Piternick

University of British Columbia School of Librarianship Mr. John Plant

Thompson-Nicola Library System Library

Mrs. Ella Pretty

Fraser Valley Regional Library

Ms. Mary Jane Reed

Washington State Library

Mr. Peter Simmons

University of British Columbia School of Librarianship

Miss Hazel Simnett

Greater Vancouver Library Council

Mrs. Alice Simpson

Greater Vancouver Library Council

Mrs. June Soper

North Vancouver District Library Board

Mr. R. Stein

Automated Library Systems

Mr. Ralph Stierwalt

Council of Ontario Universities
Office of Library Coordination

Mr. Roy Stokes

University of British Columbia School of Librariansip

Mrs. Jacqueline Stonier

Thompson-Nicola Library System
Board of Management

Mr. Dave Stothard

University of Victoria Computing Centre

Mrs. Ruth Stott

West Vancouver Memorial Library

Mr. Basil Stuart-Stubbs

University of British Columbia Library

Mr. Gary Telford

Fraser Valley Regional Libray

Mr. Larry Thomas

Simon Fraser University
Library

Mrs. June Thomson

University of Victoria Library

Mr. David Twiest

Trinity Western College Library Mr. Wm. Watson

University of British Columbia Library

Miss Linda Webster

Government of British Columbia
Provincial Archives

Mr. Gerry Weeks

British Columbia Institute of Technology Library

Mr. Ed. Weinstein

Simon Fraser University Library

Mr. R.J. Welwood

Notre Dame University of Nelson Library

Mr. Cecil Whitlock

Royal Roads Military College Library

Mr. Doug Williams

Cariboo College Library

Mr. Dave Williams

Douglas College Library

Mr. Alan Woodland

New Westminster Public Library Library

LIST OF CONTACTS THAT DID NOT ATTEND

Mr. Bruce Alper

Richard Abel & Co. Library Systems

Dr. Wm. M. Armstrong

Universities Council of British Columbia

Mr. R. J. Culos

Library Development Commission

The Honourable Eileen Dailly

Government of British Columbia Minister of Education

Miss Enid Dearing

North Vancouver District Public Library

Mr. J. L. Duncan

Library Development Commission ?

Mr. R. D. Ferguson

Library Development Commission ?

Mr. Max Gnehm

Richard Abel & Co.

The Honourable Ernest Hall Government of British Columbia Provincial Secretary

Dr. S. A. Jenning University of Victoria Presidents Office

Mr. M. P. Jordan Vancouver Public Library Library

Dr. D. Kenny University of British Columbia Administration

Alderman Mary Kerr West Vancouver Memorial Library

Mr. Edward L. Maguire Information Dynamics Corp.

Dr. Glenn M. Martin Royal Inland Hospital

Miss Helen Moore City of North Vancouver Public Library Library

Mr. W. H. Overend Fraser Valley Regional Library

Mr. Harry Pankratz Vancouver City College Admimistration

Mr. W. Bill Parker Kootenay Library System Committee

Mrs. Daphne Scott Northcoast Regional Library Committee

Mr. Erik Searight Jostens Library Services

Dr. Guy Sylvestre Government of Canada National Library

Mr. Allan R. Turner Government of British Columbia Provincial Archives

Mrs. Byrl M. Ward Powell River District Public Library Association

Mrs. Sophie Weremchuk Library Development Commission

Mr. H. R. Whiddifield University of Victoria Systems & Computing Services

Mr. Fred White Vancouver Island Regional Library Library

FIRST PROVINCIAL CONFERENCE ON CATALOGUE SYSTEMS

Appendix III

The Library Development Commission of British Columbia

and Tri-University Libraries

under the authority of

October 25, 1974.

The Provincial Secretary of the Province of British Columbia

November 15, 1974

The First Provincial Conference on Catalogue Systems is now recent history, but does we hope signal the beginning of some initiatives which will lead to the planning and development of improved Library Catalogue Systems.

As a next step and a follow-up to the Conference, a report is to be prepared which provides for the library community a unique opportunity to express in writing to the Government and The Library Development Commission, some specific recommendations regarding priorities and steps to be taken.

Although an important resolution was passed by the conference, there are we believe some other recommendations which should be considered, and the intent of the conference resolution needs to be made explicit.

This questionnaire approach is intended to determine the degree of support for a list of recommendations prepared for your consideration, and to solicit comments and other recommendations for proposals to the Government.

In addition to indicating your agreement or disagreement with the recommendations presented in the enclosed questionnaire, we urge you to take the time to include comments on each recommendation, and to provide additional recommendations you feel should be considered.

All responses will be tabulated and summarized in the report to the Government highlighting significant comments and suggestions. Completed questionnaires will be deposited with the Government as source documentation to the report.

A copy of the report will be distributed without charge to everyone who attended the conference, and to those contacted but unable to attend. A transcript of the conference program is in-preparation and when completed a notice will be sent, indicating price and requesting orders.

It would be very much appreciated if the questionnaire and your response can be returned to me by the end of November, in order that the report to the Government can be completed before December 15.

Sincerely,

Vancouver, B.C.

RWM/iv

for Coordinating Committee; Ross Carter, Vancouver Community College R. MacDonald, University of B. C. Joan Mitchell, Library Development Commission

Peter Simmons, UBC School of Librarianship

Coordinator: R. MacDonald, University of B.C. Library, Vancouver, B.C. V6T 1W5 Phone: 228-3101

FIRST PROVINCIAL CONFERENCE ON CATALOGUE SYSTEMS

The Library Development Commission of British Columbia

and Tri-University Libraries

under the authority of

Vancouver, B.C.

October 25, 1974.

The Provincial Secretary of the Province of British Columbia

Questionnaire on Catalogue System Recommendations

A List of specific recommendations is presented herewith for your consideration and comment. Will you please indicate for each recommendation, your agreement or disagreement.

Provision is made for entering comments on each recommendation, and if you have additional recommedations to submit, these can be entered on separate papers.

Ten recommendations are presented, with the first two recommendations reflecting a proposed rewording of the resolution passed at the conference. The intent of the conference resolution has been preserved, but appears in two separate recommendations. The remaining recommendations deal with related issues and other issues which we believe should be addressed in the report to the Government.

As an explanation for the proposed rewording of the conference resolution, we have included below some comments taken from the tape recording of the resolution as voted upon, and the comments of Mr. Knapp which formed the basis for the resolution.

The conference resolution was as follows;

that the Library Development Commission be asked to support first of all the implementation of immediate service to satisfy the immediate needs of libraries, and second, to support the appointment of a coordinator for the automated system that would ultimately encompass large numbers of libraries, perhaps all libraries in the province.

To understand the intent of this, some extracts from Mr. Knapps comments are required;

the immediate service refers specifically to a suggestion that "a batch computer-based catalogue support system be provided for those libraries expressing this urgent need during the conference."

the appointment of a coordinator refers to the suggestion that "an individual be hired, someone like a Fred Kilgour, and be charged with the responsibility to develop a proposal, budget, etc., and install a system within six months."

emphasis was placed on this individual being able to operate independently, and a specific suggestion was made to consider a Crown Corporation.

If this intent has not been adequately maintained, we hope you will include comments and suggestions for revision.

Simon Fraser University Library Position Statement Regarding the Development of Improved Library Catalogue Systems for the University Library and its Clientele of Community College Libraries.

Simon Fraser University Library is investigating the possibility of developing and maintaining a machine-readable catalogue record data base for the University Library and the B. C. Community College Libraries on the mainland.

Simon Fraser is further investigating the feasibility of buying packaged library catalogue systems and software to manipulate the catalogue record data base in order to produce needed book or COM catalogues, S D I Listings, etc. both for itself and its Community College Library clientele.

COMMENT:

1. Preliminary investigation of the automated shared cataloguing services offered by the Ohio College Library Centre in Columbus, Ohio, indicates that Simon Fraser can build the machine-readable catalogue record data base at no added cost to the University. Simon Fraser's participation in OCLC and the building of a regional data base can be paid for with savings realized by the automation (via the OCLC services) of its present bibliographic search and catalogue card operations.

(Simon Fraser University Library Position, continued)

- 2. The OCLC-MARC II catalogue record machine-readable data format is compatible with Canada's CAN-MARC record format. Therefore, OCLC-MARC II records captured and stored by Simon Fraser University Library can become an integral part of any future provincial and national data bases and library network developments.
- 3. Simon Fraser is in a unique position to offer its services to the college libraries in the spirit of cooperative library development for the Province of British Columbia. It has four years of practical experience with centralized processing and library cooperation. It is presently doing centralized library processing for five of the eight B. C. Community College Libraries on the mainland. The Simon Fraser Library is familiar with many of the college library needs, and has developed important cooperative working relationships with these institutions. Simon Fraser believes that its services to the college library community is viable and successful; and that these services can and should be expanded both in range, and in quality.
- 4. Simon Fraser shares the concern expressed at the First Provincial Conference on Catalogue Systems, that every effort must be made to avoid unnecessary expenditure on local library systems development throughout the Province of British Columbia.

The existence of many library software systems presently on the market (OCLC is one such system) offer great opportunity for the Province to minimize the cost of its provincial library network systems development. These

(Simon Fraser University Library Position, continued)

software packages can be leased or purchased at a small fraction of their original development cost.

Simon Fraser believes that the present state of the art of library automated systems development, bibliographic standardization, and networking permits a creative and flexible approach to the solution of a province-wide library systems network.

5. Simon Fraser believes that this statement of position is not in conflict with the other proposals and recommendations provided in the questionnaire growing out of the First Provincial Conference on Catalogue Systems. I am attaching this position statement as part of our response to the questionnaire.

Donald A. Baird

University Librarian

DAB: dcr November 29, 1974 Questionnaire Comments from recommendation #1 Concerning; appointment of coordinator

In Agreement

"This is the crucial proposal in this questionnaire. It should, however, be accompanied by a request for funds — with a preliminary 5 year projection of needs, so that resources are made available in sufficient quantity to get the job done.

It is also crucial that some clarification be made in the proposal as to the relationship between the Coordinator and the proposed Directing Council in recommendation No. 3."

"The urgency comes from those who said they were about to get into the computer assisted record game independently — because there was no leadership from provincial agencies. It seemed to me that they felt that it would cost more to do it individually than in concert."

"I am not a librarian and am therefore not responding to the question of which library procedures ought to be given highest priority or how the public university—government libraries should work in concert; but only to the concept of clearly assigning a project to some individual with both time and expected results defined."

In Disagreement

"Because it conflicts with the recommendation which has already been made to the Dept. of Education regarding the establishment of a College Processing Centre.

The proposed CPC is to be the subject of an initial feasibility study. A great deal of effort has already gone into this proposal over a 1-2 year period of preparation."

Agreeing but questioning

"I presume that this will replace the feasibility study proposed by the Community College Librarians and S.F.U. to the B.C. Provincial Govt."

Questionnaire comments on recommendation #2 concerning; priority for catalogue support

In Agreement

"I'm not sure that the six month figure is realistic, but I don't really know. If it is not, does some consideration have to be given to an intermediate step. One of our major universities is talking about linking to an existing system."

"The purchasing or leasing of a catalogue support system would permit much more rapid implementation of service than would the developing of a new system. Some of our techniques perhaps would not lend themselves to punched cards — for example, the assignment of extra subject headings.

The costs to us of participation in a catalogue support system might not be justified by the benefits we might receive."

"It is important that all effort be made to assure that the Coordinator will be able to act quickly and effectively; but it is perhaps too premature to place time constraints on him before the problem, priority needs, and all alternatives have been evaluated. Problem definition must get sufficient attention, before jumping into any implementation project. On the other hand this proposal recognizes that the Coordinator should not get stuck at the first stage of development."

"The initial system should have the capability of the maintenance of individual library data bases in a format compatible with national and international standards. In addition the individual library data bases must be capable of combination into union catalogues. Output products to include catalogue cards and labels and both book and microform catalogues."

"In purchasing or leasing such a system my first preference by far is the Washington Network. It is the most complete and follows the standard set by Marc totally. This allows for better adaptation later.

The least desirable will be the leasing of commercial services such as Abel."

"The on-line system should be used down in the initial stage, even if this would mean a few more months of delay in implementation of the system, except that the expectation of "a service to be implemented within 6 months" may be difficult to achieve, if only from the point of view of "fitting" one of the existing systems to a B.C. computing facility, with the associated tasks of possible hardware changes and financing arrangements."

In Disagreement

"I would agree if it were to follow the establishment of a College Processing Centre rather than be the 'initial' stage. Incidentally, what do we mean by 'similar in objective & scope to those demonstrated." I'm not convinced we need another OCLC here, nor that it is worth the expense. But in any event we should define our objectives much more specifically."

Questionnaire comments of recommendation #3 concerning; directing council

In Agreement

"Absolutely vital that the Director of the system be responsible to the users. Vague "advisory committees" are not good enough. Ontario's Bibliocentre (Community College Centralized System) is a good example of what happens when Director is given carte blanche and need not report to his users."

"The development of an inter departmental authority to whom the "Crown Corporation" would report might be considered. Certainly a crown corporation would have to be assigned to a particular ministry otherwise."

"I strongly support this recommendation as an essential first step in any province-wide system planning. The need for such a directing council was made clear at the Conference from the fact that:

- (a) The "Provincial Library" has reverted to its official title of the sphere of government libraries;
- (b) The proposals developed by the Legislative Librarian and the Director of the Library Development Commission for a catalogue support system and library resource centre were directed at public libraries, and did not take into consideration the needs of the school libraries, and requirements of, and developments in, college and university libraries."

"I regret the almost total responsibility given to the LDC for initiating this venture."

"We cannot push too strongly or too rapidly for a Directing Council and a new entity, a Crown Corporation."

"While I support this resolution, it remains unclear what is to be the role of the Library Development Commission whose responsibility the first resolution makes it to appoint the coordinator. Is it desirous that the conference resolutions indicate anything of the relationship of the coordinator to the directing council and both of these to the LDC?"

In Disagreement

"The Library Development Commission already in existance can surely do this job."

"As a taxpayer and representative of taxpayers, I strongly object to unnecessary and expensive duplication of government bodies."

"Someone has to make decisions and a repeat of the "vested interest" shown at the conference and duplicated by a Directing Council would result in long delays."

"Should be more specific regarding scope of "directing council," — matters relating to funding, policies, objectives and responsibility and projects, systems developments, or system operation. Could be interpreted as referring to the new public library systems in the LDC's programme for Library Development — Suggest that words be added such as 'computer based catalogue support systems.'

"Government bureaucracies as suggested in Crown Corporation don't seem to get the job done very efficiently and if a council encourages more communication and less activity in developing a system I am against it. Coordination is great but more is needed than coordination."

Qualifying comments

"I don't disagree with the intention to promote communication, but libraries especially academic ones, already work under so many internal and external constraints that I hate to think of yet another "Directing Council" particularly cutting across 'type of library' boundaries. I would like to see LDC TRIUL, BCLA and CACUL take on this responsibility to coordinate."

Questionnaire comments on recommendation #4 concerning; province-wide concepts

In Agreement

"I strongly support this recommendation. I would also point out that, if the concept of province-wide systems is accepted, the need for immediate action is vital, before any further steps are taken to develop individual systems, which would not necessarily be compatible with ones developed for the province as a whole."

"Perhaps we should be thinking of "Western Canadian" rather than provincewide systems."

"The great advantage of centralized cataloguing for us is that it would free us to do more analysis and indexing of material and to catalogue certain works in greater depth. Any backlog that we have consists largely of pamphlets ephemera, fugitive material, that no-one else would be cataloguing. A province-wide catalogue system would not help us to catalogue these types of materials."

Questionnaire comments on recommendation #5 concerning; union catalogue

In Agreement

"As noted earlier, this feature should be part of even the initial system installed. I see it as fundamental to whatever is being attempted in all these proposals and should be part of the design from day one. I stress this point because too many systems have been designed to manage a single data base but cannot combine data bases to support multiple locations. OCLC is a good example. Multiple locations show only if the user identifies bibliographic duplicates, there is nothing in the system which pulls them together."

"A union catalogue will be worthwhile if the member libraries will loan to other member libraries. This would mean a change in the I.L.L. policy of some of the university and other libraries."

"The Archives would be glad to contribute to a union catalogue. However, much of the material currently being catalogued is not recently published, is physically insubstantial and exists in very few copies. Therefore, many of our entries, and our requirements, would be unique. Some of the material that we catalogue, such as music programmes and election brochures, might not be of interest to many library users. And conversely, we might not be concerned with many of the books that are catalogued in public library systems."

In Disagreement

"Would a union catalogue not Automatically be part of a support system? Can you reword recommendation to read, "Resolved that we be asked to obtain the information and support from the National Library already promised at the conference."

Comments on recommendation #6 concerning; crown corporation

In Agreement

"Independence of the directing body hopefully would tend to free it from prior committments and influences that could hamper its work."

"Isn't our largest organization (UBC) best equipped to provide basic data base and computer technology?"

"As an essentially self-supporting outfit, the corporation would have to remain responsive to the needs of its customers, the libraries, if it intends to be paid for its services."

"As a fee-for-service entity, the corporation does not receive direct funding from the government except for development capital. This means the bibliographic centre does not become some kind of a super-agency siphoning funds that otherwise would have gone to library budgets. It is important that this threat not develop and that the libraries continue to control their own budgets."

In Disagreement

"As in recommendation #3, what do we have the Library Development Commission for? Their "vested interest" is surely the development of all library services in the province."

"Again I strongly object to paying for unnecessary duplication of government bodies."

Questionnaire comments on recommendation #7 concerning; standards

In Agreement

"But a better way would be for the universities and VPL to get together and create a unified system for themselves. It would grow by accretion."

"Standardization of entries is vital; but in the Provincial Archives, where the book collection performs a support function for other forms of material, we go to rather more trouble to establish personal and corporate names than do other institutions. We feel that we have a responsibility to do this. But this means that the entry we decide on is sometimes quite different from that used by LC or Canadiana. It would be unfortunate if we were unable to continue practices that are well established in our catalogue."

Questionnaire comments on recommendation #8 concerning; compatibility with other systems

In Agreement

"Generally speaking, I believe we drop high standards far too quickly. It is easier to start with full MARC in the data base and let various libraries use desired tags than it is to go back and revise the standard upward when it is needed later."

"This should probably be a second priority, in my opinion. What other viable computer-based systems are there which we could interact with? Are they the best? Should we conform to their format or be compatible?"

Questionnaire comments on recommendation #9 concerning; school libraries

In Agreement

"Although I agree that school libraries should be represented in the discussion and development of a provincial or regional catalogue system, I think the resolution should be more specific as to where this representation is to exist. Will it be on the recommended organization structure (Crown Corporation)?"

"Representation could have been requested from BCTF's school librarians group."

"It would be pointless to proceed without the full cooperation of the Department of Education and all school systems."

"I find no mention of the College Libraries either in these recommendations. The Tri-University Libraries often speak well on behalf of the College Libraries but I do think we should not take their concern for granted, nor impose it on them. If Tri-University Libraries means College and University Libraries then let us say that; if it doesn't then let us name a representative body from the College Libraries as well."

Questionnaire comments on recommendation #10 concerning; second provincial conference

In Agreement

"I strongly support this recommendation. The First Conference was to a considerable extent an educational experience for many of those attending, who would otherwise have been unable to see or discuss the potentialities of computerized bibliographic systems, or to consider their application in a province-wide system, or many of the implications of such a system. Regular follow-up is necessary to ensure proper feedback during system planning and trials, and to develop the kind of cooperation without which the system will not work to its full potential."

"Should involve an official government response to the proposals. The Conference would be more an information device than a working group — if the instrumentality of the Coordinator and Council is established."

"A second conference would be most valuable. One would then be able to speak from actual experience."

"If such a conference is planned, try to tie it in with some other meeting such as just before the annual BCLA meeting in the spring (if that is not too early). This makes it easier to justify travel expenses, etc."

"Why not invite the Ontario Bibliocentre to explain their system. We should see examples of what to avoid as well as what to emulate."