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Proposal for a Social Cataloguing Program

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Proposal for a Social Cataloguing Program

Context: Our Existing Social Discovery Overlay

In 2011, our library adopted a social discovery overlay powered by BiblioCommons for the catalogue, which provides our patrons with the following features: “faceted navigation, relevance ranking, and social features, such as the ability to add tags, reviews, and ratings to individual bibliographic records, as well as the creation of user-defined lists” (Spiteri, 2011, p. 56). The library’s two primary goals at the time of making the shift to social discovery were: 1) enhanced search and discovery experiences for our patrons; 2) increased connections between library patrons and with staff via the catalogue, particularly for patrons without easy access to a physical library branch.

We invested in social discovery ten+ years ago partly due to our understanding – an understanding that remains essentially unchanged today – of the potential of user-generated content, notably tags, to “greatly enhance organization, representation, and retrieval” (Spiteri, 2016, p. 173) by providing complementary elements to our legacy catalogue’s librarian-controlled bibliographic records. The differences between the two systems – user-generated metadata and librarian-controlled metadata – are what makes combining them a potentially powerful strategy, with the weaknesses in one offset by the strengths of the other. As Spiteri (2016) reports, “tags reflect users’ language, needs and conceptions of information [...] [and] are also highly responsive to changes of user vocabularies and needs” (p. 174), while controlled vocabularies are criticized for lacking these qualities. Tags, reviews, and ratings hold similar potential to reveal a more “complete picture of the title, including its subject and emotional impact, and their reading experience,” that, in striving for objectivity, librarian-controlled bibliographic records are not intended to convey (Spiteri, 2016, p. 186). The

strengths of user-generated metadata in comparison to librarian-controlled metadata suggest how it could increase access to our collections and services for historically under-served library populations. To put it another way, prioritizing the engagement particularly of members of marginalized communities in the contribution of user-generated metadata has increased potential to correct for biases in our bibliographic records and thereby enhance the accuracy and searchability of our catalogue for patrons. This is a key axis of the Social Cataloguing Program that is the subject of this proposal.

Shortly after our adoption of the social discovery overlay, researcher Louise Spiteri conducted a usability study with transaction log analysis (TLA) to gather data on how our patrons were using the system and its varied features (2011). That case study is the most in-depth research to date that has been conducted on how patrons use our social discovery features. Key findings of Spiteri's 2011 case study include:

- 1) The facet used most predominantly to refine search results is Format (65%). The only social feature that appears as a facet is used infrequently: tags (1.10%) (p. 57).
- 2) Lists are the most popular user-generated content feature, with the List Bibliographies, My Collection Bibliographies, and For Later List features together representing 75.51% of all user-generated content.
- 3) Except for ratings, which were assigned to 32 records (72%), social features are not being used significantly; for example, tags were assigned only to 3 records (6%) and Comments only to 10 records (20%) (p. 59).

Overall, Spiteri found that our catalogue system's "social features, with the exception of [lists] and ratings, [were] not being used significantly (p. 59). While the why of this failure falls outside the scope of Spiteri's case study, she notes that sites such as *LibraryThing*, *Amazon*, and *IMDB* are all "successful in generating user-created metadata" (p. 61), so why not our library? Spiteri (2011) theorizes, "Is it because people are so used to library

catalogues whose content has always been controlled by library staff that they are afraid of adding their own content to bibliographic records?” (p. 61).

Based on my exploration of our catalogue and discussion with colleagues, my sense is that today, ten+ years after we integrated social features into our catalogue system, Spiteri’s finding that they are not being used significantly is still true. Whether or not this unverified sense is correct, this program proposal is based on the conviction that experimenting with a more intentional engagement strategy that enables us to investigate the willingness and motivations of patrons to contribute metadata to the catalogue and how that engagement benefits, or fails to benefit them, is important to informing our maintenance and potential future development of the social features of our catalogue.

Spiteri’s 2011 study provided data on how patrons are using the system, but it did not provide data on patron motivations for, perceptions of, and satisfaction with the system’s various social features (Spiteri, 2011, p. 61). Given how dated that study is now, currently we lack data both on how the social features are being used and patron motivations for using them. The Social Cataloguing Program proposed here is designed to tackle these questions by engaging a diverse array of patrons in enjoyable, meaningful, social ways with the catalogue and measuring the outcomes. The data that we collect through this program can then be used to inform decisions about future investment in maintaining, adapting, or evolving our social discovery overlay to the catalogue.

Description to be used to advertise the program:

(Title) Social Cataloguing Workshops (ages 16 and up)

The catalogue is the heart of our library. Drop in via Zoom or in-person on one of our monthly themed workshops to learn how to take a more active role in finding, curating, and sharing the resources in our collection in a social, supportive environment. Edmonton Public Library Central Branch, first Saturday of every month, 10-10:45am.

Tentative Schedule

- June 4, 2022 – Social cataloguing fiction
- June 11, 2022 – Social cataloguing by and for immigrants, refugees, and newcomers to
- Canada
- June 18, 2022 – Social cataloguing resources by and for LGBTQ+ community members
- June 25, 2022 – Social cataloguing resources by and for Indigenous community members
- July 2, 2022 – Social cataloguing resources by and for makers
- July 9, 2022 – Social cataloguing resources by and for new parents
- July 16, 2022 – Social cataloguing resources by and for people with disabilities
- July 23, 2022 – Social cataloguing resources by and for coders
- July 30, 2022 – Social cataloguing by and for people who are homeless

What are the goals and outcomes?

Goal: Provide a social, enjoyable, informative experience of the catalogue and its social features for a diverse array of patrons

Outcomes:

- Increased user-generated content, including tags, ratings, reviews, and public list-sharing by program participants
- Increased discovery of resources by program participants, notably for members of historically under-served library communities
- Increased community-building and connections between program participants and between participants and staff via the catalogue

How will the program be measured and evaluated?

Participation Rate

Participant counts will be made at each monthly workshop to guide decision-making about the appropriateness of the times and physical space designated for the program. I do not

advocate simple headcounts as a measure of the value of individual participant experiences, but headcounts can also be used as one indicator of community interest levels and the effectiveness of program advertising.

Participant Survey Data

Participants will be invited by staff to be contacted via the catalogue's internal messaging system with an immediate survey following the workshop and a follow-up survey in three months time. Those who opt-in for the survey will provide staff with their account names. Staff will explain the point of the survey and emphasize the value of honest feedback. When the surveys are sent to participants, staff will invite participants to ask if they need help interpreting or translating the survey or have any questions.

- Example of immediate survey format:

We want this workshop to provide you with a beneficial experience. Please tell us how we did:

- 1) You enjoyed learning about social cataloguing [*that month's resource theme*]. (Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)
- 2) You enjoyed finding, sharing, and discussing [*that month's resource theme*] with other patrons and staff. (Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)
- 3) In this workshop, you discovered resources in the catalogue that are of value to you. (Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)
- 4) After this workshop, you intend to contribute more tags to catalogue records. (Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)

- Please expand on your motivations for, or disinterest, in contributing

tags: _____

5) After this workshop, you intend to contribute more ratings to catalogue records. (Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)

- Please expand on your motivations for, or disinterest, in contributing ratings:_____

6) After this workshop, you intend to contribute more of your own reviews to catalogue records. (Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)

- Please expand on your motivations for, or disinterest, in contributing reviews_____

7) After this workshop, you intend to share, as in make public, your lists in the catalogue (Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)

- Please expand on your motivations for, or disinterest, in publicly sharing your lists_____

8) Before this workshop, how frequently did you contribute tags to catalogue records?
(Never / Almost Never / Occasionally / Regularly / Often)

9) Before this workshop, how frequently did you contribute ratings to catalogue ratings?
(Never / Almost Never / Occasionally / Regularly / Often)

- 10) Before this workshop, how frequently did you contribute reviews to our catalogue records? (Never / Almost Never / Occasionally / Regularly / Often)
- 11) Before this workshop, how frequently did you share your lists by making them public? (Never / Almost Never / Occasionally / Regularly / Often)
- 12) Before this workshop, how frequently did you search the catalogue using tags? (Never / Almost Never / Occasionally / Regularly / Often)
- 13) Before this workshop, how helpful did you find patron ratings and reviews to discovering new items in the collection? (Not at All Helpful / A Little Helpful / Helpful / Very Helpful)

Example of follow-up survey format sent to workshop participants three months after their attendance of the workshop:

- 1) In the three months since you attended the social cataloguing workshop, how frequently do you contribute tags to the catalogue? (Never / Almost Never / Occasionally / Regularly / Often)
- 2) How frequently do you contribute ratings to the catalogue? (Never / Almost Never / Occasionally / Regularly / Often)
- 3) How frequently do you contribute reviews to the catalogue? (Never / Almost Never / Occasionally / Regularly / Often)
- 4) How many lists have you publicly shared in the catalogue? (None / 1 / 2 / 3 / More than 3)
- 5) Since the workshop, how frequently do you search the catalogue using tags? (Never / Almost Never / Occasionally / Regularly / Often)
- 6) Since the workshop, how helpful do you find patron ratings and reviews to discovering new items in the collection? (Not at All Helpful / A Little Helpful / Helpful / Very Helpful)

7) You get a sense of satisfaction and enjoyment from contributing content to the catalogue.

(Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)

- Please expand on your sense of satisfaction and enjoyment, or lack thereof, in contributing content to the catalogue

8) You enjoy a sense of community connection in using the catalogue (Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)

9) You feel connected to other patrons and library staff in using the catalogue. (Strongly Disagree / Disagree / Neutral / Agree / Strongly Agree)

10) What features would you like added to the catalogue?

11) What changes would you like made to the catalogue?

How will the workshop be presented?

A community librarian, a reference librarian, and a community leader will jointly lead each workshop, with IT support in combination with a library assistant managing remote participation via Zoom. The staff members who volunteer or are asked to lead the workshop should explore in advance the resources available in the catalogue in collaboration with the

community leader co-host. Together, the co-hosts will select 3-4 resources from the library's catalogue to present during the workshop. A librarian host will begin each workshop with a 3-5-minute intro on the catalogue and its social features – tags, ratings, reviews, lists, and internal messaging system – followed by a question-and-answer period. Within 10 minutes of the start time, the co-hosts will begin presenting the selection of resources and its potential relevance, spending roughly 3-4 minutes on each record. The time remaining (roughly 20 minutes) will be used for organic discussion and questions about search and discovery challenges and sharing of favourite resources. The co-hosts will set a nonjudgmental, supportive, informal tone to the discussions. Library staff will put together a display featuring information on social cataloguing and featuring materials from the library's collection relevant to that month's theme. The display should also present the workshop's two-month schedule and should be visible at every workshop.

What library staff will be involved and what will their roles be?

- Director of Public Service: program approval and supervision
- Community librarian(s):
 - Host the workshops and prepare resources in collaboration with co-hosts.
 - Identify community leader co-hosts and pitch co-hosting the workshops to them. Ask all those contacted, whether they agree to co-host or not, to display workshop posters in their workplaces and to advertise the workshop on their websites and social media accounts.
 - Supervise advertising strategy.
 - Analyze the data that is collected and prepare a report based on that data in evaluation of the workshop and its impact in collaboration with community librarian co-host(s) and library assistants.

- Organize a post-mortem with all staff directly involved in the workshop and the Library Director within a month of the workshop's conclusion to present the data and accompanying report with findings. Get everyone's input on how it went and what could have been done better. Discuss if this workshop merits being offered again or on an ongoing basis.
- Email entire library staff informing them of this program at least two weeks before the workshop's first meeting. Once the workshop has ended, data collection and analysis has been completed, evaluative report has been written and discussed by the team, email blast the entire staff again to recap for everyone how the workshop went and future plans.
- Reference librarian(s): Host the workshops and prepare resources in collaboration with co-hosts.
 - Analyze the data that is collected and prepare a report based on that data in evaluation of the workshop and its impact in collaboration with community librarian co-host(s) and library assistants.
 - Organize a post-mortem with all the staff directly involved in the workshop and the Library Director within a month of the workshop's conclusion to present the data and accompanying report and get everybody's input on how it went and what could have been done better. Discuss if this workshop merits being offered again or on an ongoing basis.
- Library assistants and pages: Design advertising strategy with input and supervision from community librarians. Create library social media posts and an advertisement for the library website in collaboration with tech support. Create a poster that can be printed and displayed in the library as well as at community partner spaces. Create and distribute

participant surveys with tech support. Collect the data and record it in a database or spreadsheet.

- Systems Librarian / IT: tech support for email blasts; tech support for formatting and publication of program advertisement on library website; tech support for providing files in appropriate formats destined for partner social media accounts and websites; tech support for surveys via the catalogue's internal messaging system

Is this a one-time program?

Initially, this workshop will run as a one-time 2-month program. The format will be drop-in, no registration required, to simplify the organizational demands on library staff. At the end of the first run, the library staff will decide together based on the report findings if the program's impact merits another run.

Budget

The cost of this program is staffing hours, which will be funded by municipal tax dollars. The rough estimate of staff hours required to run this program:

- Library Directory: 1 hour over two months
- Director of Public Service: 4 hours over two months
- Community librarian(s): 70 hours over two months.
- Reference librarian(s): 50 hours over two months
- Tech support: 12 hours over two months
- Library assistant(s): 26 hours over two months.

Rough estimate of total staff hours: 163 hours over two months

Conclusion

Thanks to our head start as early adopters of social discovery, we are in an excellent position to maintain our role as a leader in the space of social catalogues, which many library scholars and practitioners promote as the future of libraries (Calhoun 2006; Fast & Campbell

2004; Furner 2007; Spiteri 2009 as cited in Spiteri 2016). The collaborative spirit and potential benefits of a social catalogue remain in strong alignment with our library's mission: "to share expertise, information, technology, and space with Edmontonians for learning, connecting, creating, discovering, and enriching communities" (EPL, 2022). Finally, the community-led approach of this program aligns with our existing community-led service philosophy (EPL, 2022). As stated in the promotional blurb for this program provided above, the catalogue is the heart of our library. This program is designed to increase engagement with our catalogue by a diverse array of patrons, to realize more fully the benefits originally sought in our switch to social discovery, and to inform future decisions on the maintenance and further integration of evolving participative technologies into our catalogue.

Reflection

The Social Cataloguing Program that I ended up writing is very different and, notably, much less ambitious than the one that I had envisioned at the start of my project. At the start, I understood social catalogues as a relatively controversial, radical initiative for public libraries in Canada to undertake. While my initial understanding that they are controversial still holds, when I began researching what had already been done in this space, however, I realized that most of Canada's public libraires have already invested, most of them around ten years ago, in social discovery overlays, powered by external privately held tech companies. Honestly, I feel sheepish that it was only through my research on social catalogues for this course that I began noticing the social features that are already standard in existing public library catalogues. (Maybe I can use the excuse that I am only recently rediscovering the Canadian public library system after having spent twelve years out of the country.)

While new innovations and improvements are possible, the basic technical functionalities and privacy agreements of library social catalogues that I had initially imagined tackling turn out already to be arguably adequately in place. This significantly

changed my outlook on my project. Subsequently, I considered writing a proposal for switching from a social discovery overlay of the library catalogue to a completely new catalogue that includes more advanced social features. Laurel Tarulli (2012) cites the cost of such a transition as the reason that most public libraries continue to retain their legacy catalogues and merely add overlays (p. 14). Indeed, as William Doering (2000) notes, “Implementing a new catalog is perhaps the biggest and most expensive project most libraries undertake.”

My reason for not writing that proposal, however, was not the magnitude of “the time, expertise, cost, and additional resources required to implement or transition into a completely new catalogue” (Tarulli, 2012, p. 14). With this final project, I feel free to dream; furthermore, what I had learned in my LIS9610 Public Librarians course (Summer 2021) about the opportunities of public libraries to secure massive grants from private corporations for innovative technology projects encouraged me that funding could potentially be secured for a strong enough proposal in this space. Instead of discouragement at the cost, I abandoned this proposal because I lacked conviction that such investment would be justified based on the impact of existing social features of public library catalogues in Canada. In sum, I was uncomfortable writing the proposal for an entirely new social catalogue, because I was not sure that I believed in it. I realized that what I really needed at this point was further insight into the impacts of current social discovery overlays on library catalogues and patrons.

Clay Shirky’s work on cognitive surplus and participative technologies raised an important question for me that ultimately led me to the proposal that I ended up writing: what motivates certain people to contribute to collaborative online projects and not others? I was bothered that Shirky’s work does not adequately address the issue of unequal access to online spaces. I am thinking of the digital divide here less in terms of access to broadband internet and more in terms of education and how people’s perceptions and experiences of participative

technologies are shaped by a multitude of socioeconomic and sociopolitical factors. In considering the question of equalizing access via education and engagement in the context of a public library social catalogue, meanwhile, I was troubled by my uncertainty that the benefits of participation for many patrons would not be strong enough to justify library programming designed to recruit them as content contributors. As you explain in your week 9 slides on the digital divide, “Being ‘expected’ to learn new skills [such as how to use the social features of a public library catalogue], especially ones barely relevant to daily life, on top of the requirements for everyday survival is a lot to ask” (Mayhew, 2022, slide 28).

Discovering Jane McGonigal’s work, particularly her “Finding the Future” (2011) participative project at the New York Public Library, was a turning point for me, revealing to me the possibilities – when significant investment is made on doing engagement well – of participative technologies in the context of public libraries to provide tangible benefits for patrons. While “Finding the Future” seemed to provide participants with a wonderful experience, I wondered about the socioeconomic diversity of those participants... Meanwhile, McGonigal’s (2008) research on the emotional goals and motivations of online game players further indicated to me the potential rewards of “positive emotions – pride, curiosity, love, and feeling smart” for patrons of participative technologies and, specifically, of contributing content to the catalogue. Finally, as I discuss in the proposal above, Louise Spiteri’s (2016) research on the potential of user-generated metadata to counteract the biases of hegemonic cataloguing standards and thereby increase access and retrieval of under-catalogued items also served, for me, as adequate justification for proposing a program designed to engage a diverse array of patrons with the social features of the library catalogue.

After strengthening my conviction about the potential benefits, I then composed my modest program proposal of a community-led strategy for engaging patrons with the existing social features of today’s public library catalogues – a program that I hope is designed in a

way that would provide its participants with real benefits, notably discovery of resources in the catalogue that are of value to them. This program is less ambitious than the one that I originally set out to propose, but I argue that the program I ended up proposing represents a genuinely helpful, well-founded next step in the evolution of participative technologies in today's public library catalogues in Canada.

As a final note, I used what I had learned in my LIS9610 Public Libraries course (summer 2021) about library programming to inform the design of this program proposal; in particular, I was influenced by Bill Irwin's (2017) work on outcome-based evaluation models and the Public Library Association's project measurement initiative, "Project Outcome," which provides a free library toolkit for measuring the impact of library initiatives via surveys. In adapting the survey format provided by Project Outcome, I applied what I had learned about composing surveys in LIS9004 Research Methods (summer 2021).

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