

BCLA Cataloguing & Technical Services (BCCATS) Interest Group

Spring Meeting

May 9th, 2018

KPU Richmond Campus

MINUTES

In attendance:

Samantha Bloomfield	Surrey Schools	bloomfield_s@surreyschools.ca
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Teleconferencing:

Kathy Peters	Douglas College	petersk@douglascollege.ca
Trevor Smith	Douglas College	trevorsmith@douglascollege.ca
Karen Pickard	Legislative Libraries of BC	
Valerie Grace	Vancouver Island Regional PL	
Rachel Rogers	Greater Victoria PL	
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Dean Seeman	Univ. of Victoria	dseeman@uvic.ca
Karen Nelson	Univ. of Victoria	karenjnelson@uvic.ca

Guests:

Nigel Long	OCLC	longn@OCLC.org
Daniel Boivin	OCLC	boivind@OCLC.org

Called to order 1:02pm

1. Approval of/additions to the Agenda

One item added

Introductions

2. Review and corrections to the 2017 Fall Meeting minutes

No issues raised. Any concerns can be emailed to Samantha Bloomfield (copied to Samuel Richmond).

3. Business arising from the minutes

[item 3.2] The biography of Mac Elrod has not yet been approved by his family. Richard suggests sending it to Matthew who can distribute to the family.

4. Chair and standing committee reports

4.1 Resignation and call for election—BCCATS Chair

Samuel has exceeded the default limit (three years) as Chair and believes that the committee needs a fresh perspective framing the discussion. Nobody stepped forward to fill the Continuing Ed role so Maryann Kempthorne was unable to move into the role of Chair after the fall meeting.

Linda Woodcock nominated Richard Violette for the role of Chair in the absence of volunteers. Richard accepted. Karen Scherlinger volunteered to assist as co-chair. Transitions will take effect for the fall meeting.

4.2 Reports from the Continuing Education and Awards Committees

4.1.1 Continuing Ed.

No education opportunities are currently scheduled. There is interest in repeating training but trainer availability is limited.

4.1.2 Awards committee

One nomination was approved unanimously: Susan Andrews

5. CFLA REP

May Chan has moved to Ontario and invited interested parties to consider joining the Canadian Federation of Library Associations (CFLA) and Cataloguing Metadata Standards Committee (CMSC) as BC's regional representative.

The CMSC's primary mandate is to advise CFLA when developing position/documentation/strategy on cataloguing. It also sends representatives to

the Canadian Committee on Cataloguing (CCC) and the Committee on Metadata Exchange (CME).

Meetings take place twice a year by conference call.

Info at: Cfla-fcab.ca/en.about/committees/cms/committee/

6. Implementing TRC recommendations: field reports and discussion

6.1 Communiqué from William Leonard, LAC on subject headings (see Appendix

This response was received by VPL regarding inquiries on updating subject headings relating to First Nations topics.

6.2 Discussion

In practice, the terms Aboriginal / Indian / Native / Indigenous have significant differences in meaning and clarification is required. Can we not simply move to align our subject terms with the terminology First Nations groups use to identify themselves?

There are tools for looking up this kind of terminology. Efforts should include consultation with First Nations communities in order to determine how the community wishes to be represented. Making changes could create problems in the catalogues/indexes but measures can be taken to mitigate and/or correct issues that arise.

Trevor Smith suggests creating a working group to get started on a framework, focusing on four point: terminology, technology, ILS specifics and community outreach. The idea was met with general support.

7. Indigenizing description

Continuing from the conversation begun at item 6:

A similar group is already working in Alberta. The next symposium is to be held in Vancouver in May 2019. Starting our own work now will allow us to make the most of that meeting. Ryan Vernon will send something out to the listserv for people to read as a starting point.

In some academic and K12 libraries this work has already begun, driven by educational directives.

Linda nominated Trevor to lead the working group. The group will begin with an inventory of treatment already developed/being developed by BC libraries and report at the Fall meeting. Anyone interested in taking part can contact Trevor. Trevor will also send an email inviting participation to the listserv.

8. Listening tour report from OCLC Canada with Q&A (Daniel Boivin, Nigel Long)

8.1 Update: Voila

OCLC is now converting LAC local holdings data

Voila stats as of the end of April:

40,124,511 records in

479 libraries contributing

1.175 million new master records were added to WorldCat while adding amicus

140 new libraries were added to OCLC

128 million holdings were added to OCLC

8.2 Linked data

Linked data work is still in pilot phases but they are developing tools for subscription services in WorldCat and for local level applications. Documents are available on OCLC's website.

8.3 Worldshare

All libraries have access to the Worldshare metadata module, including Connexion users. OCLC will be retiring Connexion eventually (no timeline yet). Content continues to be added. Recent content providers: Emerald, McGraw Hill,

8.5 ALA summer conference

The conference will host a cataloguing community sharing session.

8.6 Decolonization of libraries

A presentation on decolonization projects in Canada featuring the University of Manitoba project is available on the OCLC website. Email Nigel for the link.

8.6 Q&A:

8.6.1 How can small non-member libraries participate in the union catalogue?

LAC will subsidize small libraries (public and academic under 50K print items only). The first round of registration is complete and a second is being considered. Subsidized membership includes access to CatExpress and one catalogue load per year. Some small libraries were rejected because they were considered part of a union catalogue and thus subsidized (such as Outlook Online members).

8.6.2 In WorldCat/Share, LCSH have protected status. How does it play out when contributed records don't use these headings?

Member libraries are permitted to have their own headings in records so long as they are coded properly. If a master record does not have LCSH, the LCSH will usually be added as improvements. The authority file, however, is controlled by NACO. You can then exclude fields as suits when downloading into your own local system.

8.6.3 Please elaborate on work to merge Amicus and NACO authority records.
Not able to answer.

8.6.4 What is the new name for the reclamation project?
Data Sync

10. Outlook Online union database survey

NELS distributed a survey to Outlook Online, ELN SerialCat, and ELN MediaCat user libraries in November (2017). The full report is available online. Questions and feedback welcome.

Highlights:

- a. 41 of 93 member libraries responded
- b. Most requests access the Outlook Online database. The Serials and Media databases were used much less than libraries believed (less than 1% of the time). NELS believes it is possible to move to one single, all-encompassing database in future.
- c. 90% are happy with current filters. Version 6 will have additional filters including custom filters (can access any MARC field).
- d. Most libraries are not uploading available open source records though some are interested in them being there. NELS will discuss the future of these with those interested libraries.
- e. Sitka libraries are unsure of extract content/frequency of loads. NELS will speak to Sitka to clarify and seek for feedback from user libraries.
- f. NELS is working on live shelf status ability.
- g. Member libraries want better media records and increased minimum standards for import.

11. Proposals for future BCCATS workshops/BCLA presentations

- a. LRM and RDA toolkit (late November?)
- b. MARCedit
- c. Openrefine
- d. PCC cataloguing basics, for specific materials.

Please send additional suggestions to Richard/Maryann, especially suggestions for potential conference sessions for 2019.

12. Next meeting date/venue

Richard will investigate booking a facility in Victoria. Dates: 3rd or 4th week of September.

Adjourned at 3:25pm.

Richard ended the meeting by saying thanks to Samuel for his service to the committee. Everyone approved with applause.

Appendix 1. Correspondence from William Leonard, Manager, Library and Archives Canada regarding alternative subject headings for Indigenous Peoples and related topics (from email sent to BCCATS listserv by Samuel Richmond, May 9, 2018)

We have been considering the question of alternatives to the LCSH Indians of North America heading for many years. Indeed, that was probably the incentive for the development of the CSH heading Native peoples, although I cannot speak to that since that happened before my time.

I would like to share with you these notes that I hope reflect a bit more than we covered in our chat.

These are some key points that it is sometimes necessary to point out:

- LAC does not hold editorial control over LCSH. That is managed by LC
- libraries can stop using the LCSH Indians of North America headings anytime with the understanding this will result in a split file
- libraries can make retrospective data corrections to remove Indians of North America headings and to add the preferred headings on old bibliographic records, as a means of avoiding a split file. If a library finds a good solution, it would be very interesting to hear about that
- libraries can update any name authority records to reflect the names preferred by the indigenous groups and nations (perhaps as found in the Xwi7Xwa names list)
- libraries can add name and subject headings established other systems or even the facets found in the LC Demographic Groups system (LCDGT). Both of these are possible in MARC21 today.
- libraries can investigate the use of the Brian Deer Classification
- libraries will want to remain cognizant of equivalences in RVM

We didn't cover the initiative from within the CFLA during our telephone call. A committee has been established to respond to the calls to action in the Truth and Reconciliation Commission. Several working groups have been formed, including one to look at subject headings and classification systems, but things progress slowly, as can be expected with groups crossing so many time zones.

It is very encouraging to see the group progressing, discussing and moving toward decisions. Several LAC staff are involved, but we all agree that this must be a community-driven endeavour. That will increase the likelihood of a new practice being embraced and broadly adopted. One thing we learned from the 2007 consultation was that there were so many possibilities, the community could not reach a decision about its preference.

Also, we have approached the Library of Congress a few times. Given that the old heading is in LCSH they must make the editorial decision to move away. The subject heading in question is part of a larger complex of headings including Indians of South America and Indians of Central America.

It is also interesting to note that in 2007 the relevant Canadian government department used the term 'aboriginal' but now it uses 'indigenous'. 'Indigenous peoples' is already

established in LCSH; it is geographically subdividable as is 'Native peoples' in CSH. The general intention now is for decisions to emerge from productive discussions within the community resulting in preferences for alternatives to Indians of North America. One possibility would be to change the CSH Native peoples to Indigenous peoples. What would you think of that?

The work of the Xwi7Xwa subject and name systems is very interesting as well and may provide an example of the future direction. It is already technically possible within MARC21 to use Xwi7Xwa terms using 2nd indicator 7 and subfield \$2 fnhl.

<https://www.loc.gov/standards/sourcelist/subject.html>

fnhl First Nations House of Learning Subject Headings (Vancouver, BC: Xwi7xwa Library, University of British Columbia)

CFLA has formed several working groups mentioned here:

<http://cfla-fcab.ca/en/indigenous/>

Within the Red, Earth, Spiritual section of the Medicine Wheel there is a working group discussing de-colonization, or should it be de-colonialization, of language used in subjects, names and classification systems. Several LAC staff people are involved in the sections of the wheel.

Last year, LAC revived the discussion, at the highest levels with LC but it had just endured the Congressional hearings on the Illegal aliens subject heading. If you recall, they were persuaded by Congress to retain the subject heading Illegal aliens because that is the term used in U.S. law. I predict they would have the same outcome if LC tried to remove and replace the 'Indians of ...' complex of headings. Nevertheless, the inability of LC to revise their heading does not prevent Canadian libraries from finding and using alternatives.

The other thing to note is that LAC is moving to WorldCat. Inside a shared catalogue, it is highly likely that the LCSH Indians of North America (INA) headings will appear to be actually 'on' LAC records in perpetuity, or until the U.S. agrees to remove the heading. Even when LAC starts adding the new headings (new CSH and/or Xwi7Xwa and/or LCDGT), the old INA ones will not disappear, because LCSH headings have a protected status within WorldCat.

Within LAC, there is also a group looking at using more socially-inclusive language in regards to all groups of people. Timelines for implementation of any changes will need careful consideration in light of the current migration of data into WorldCat and the development of an authority module within WMS Record Manager. When their paper is issued publicly, I will send the link to you.

Of course, all discussions will involve the Canadian Committee on Cataloguing. Two of the CCC reps already represent the CFLA and thereby all of the working groups. To me, the working groups within CFLA are leading the way on this. Any plan to find new terminology will have best success if the plan comes from the communities involved. I mentioned that I have also been speaking with Susan Andrews, Cataloguer at the University of British Columbia Library. Sue has been an invaluable advisor on matters

relating to RDA and subject analysis. She is also a member of the Canadian Committee on Cataloguing. Please feel free to approach Sue if you have issues you wish to be sent forward to the CCC.

I also mentioned that the current government takes the position that this is a nation to nation relationship. The words "Canada" and "North America" impose geographic subjectivity that might not be acceptable.

Right now, LAC is not in a position to edit existing headings because the data is in the middle of being migrated to WorldCat (the first of several extracts from AMICUS has been sent to OCLC and is being pre-processed right now). In the autumn, LAC will be fully working in WorldCat using WorldShare Record Manager.

Appendix 2. Round Table Reports

Camosun College Library BCCATS Roundtable Report May 2018

Submitted by

Jennifer Stenberg, Library Technician, and Gwenda Bryan, Librarian

Staffing

There have been a number of staffing changes at Camosun over the last year. Two new Library Technicians joined us this winter, Megan Nelson and Kimberley Sutcliffe. They are filling the vacancies left by the retirement of Marion Davidson and Dalyce Joslin. Library Technician Lisa Takata has taken a year long maternity leave so filling in for her will be Brittney Kreuzer.

Collections

We will be undertaking a massive weeding project this summer, to prepare for moving portions of the Lansdowne collection to our Interurban campus to support the new Centre for Health and Wellness currently under construction.

We have picked up a few new journal and database subscriptions this year, including:

- Statista
- Wiley Online: Medicine & Nursing Collection
- EBSCO's eBook Nursing Collection
- Credo Reference, Academic Core and Credo InfoLit Modules (not yet live)

Technology/Systems

We are working on a strategy to remove many of our e-resources/ebook/streaming video subscription collections from the library catalogue and activate them directly in our discovery layer, EDS. We feel this will help keep the collections current as well as save staff time.

We are moving closer to migrating to Sitka/Evergreen we have started to look at requirements and procedures to ensure as smooth a transition as possible. If anyone has any suggestions or advice that would be greatly appreciated.

We've noticed this past year a significant increase in the number of uncatalogued items received from Coutts/ProQuest. In response, we've adjusted our parameters for source MARC records and it seems to have made a difference in the number of MARC records we are receiving. We will be monitoring our results closely for the next while but everything looks good so far.

Gwenda is working with our IT department to update EZproxy to v6.3.5 and reconfiguring it to use the more secure Proxy by Hostname (we are currently using Proxy by Port).

Department/College

The Camosun Library BookSmack!© Team took the BS Cup in the first annual BookSmack!© competition at the Vancouver Island Library Staff Conference in April.

The conference provides an opportunity for anyone working in libraries on the island to connect and share ideas, and saw a record 250+ staff participating this year.

**North Vancouver District Public Library
Collection Services Department
BCCATS Round Table Report
May 9, 2018**

A few highlights to report:

Express Library Lions Gate

- A brand new (4th) location, part of a new Community Centre now under construction and scheduled to open February 2019
- Busy planning for this new collection, preparing to order, process & catalogue approximately \$50,000 worth of new items

Korean Language Collection

- A new addition to our multi-lingual collections, launched early this year

English Language Learners (ELL) collection

- Currently overhauling our ELL collection, formerly Adult Learning Collection (ALC), for improved access
- New spine label stickers, revised collection codes, streamlined Dewey numbers, etc.

Asset Management Plan (AMP)

- New District requirement now underway and to be updated annually
- We are curious if other libraries also do this for Collections

Storylab

- Preparations are underway for a new digital creation lab which will be opening next year

Workload/Workflow

- Continuously looking for ways to work smarter to manage increasing workload with existing staffing levels

Submitted by:

Nancy Hildebrand
(Library Technician)

For:

Collection Services Department
North Vancouver District Public Library

Langara Library Report to BC-CATS – May 9, 2018

Staffing:

Briana Fraser, our long serving Copyright Technician, has moved on to a position within Langara's Educational Technology department. Her position in the library will be posted soon, with the successful candidate starting this summer.

In order to account for growing demand in our Borrower Services department, we hope to add another on-going position in that department in the coming months. In addition to circulation duties, the successful candidate will help out in the Learning Commons and with processing in Technical Services.

Statistics:

The Borrower Services department has experienced a significant growth in the volume of services they provide. This is especially the case in student interactions at the Checkout Desk which saw a rise of 41% in questions answered by Borrower Services from 2016/2017 to 2017/2018.

While questions at the reference desk remain relatively stable, with between 12,654 and 13,593 questions asked at the reference desk in each of the past five years, library instruction has experienced significant growth, with 10% bump in the number of classes taught by librarians over the past year, and a 100% increase since the 2013/2014 academic year.

For a detailed look at our statistics, see our [dashboards](#).

Technical Services:

Technical Services recently completed phase one of our authority file refresh project, working with MARCIVE. Phase two involves ongoing authority processing.

Our collection of approximately 1500 VHS tapes is being weeded. We have replaced many of these titles with DVD or streaming versions.

Vancouver PL BCCATS Roundtable Report

May 9, 2018

Samuel Richmond, Head Bibliographic Services

Cataloguing Update

1. During 2017 VPL added 49,027 new bibliographic records, a 6% decrease from the previous year largely due to a plateau in newly acquired AV materials, stabilization of the e-to-physical print ratio for popular reading titles, and significant shortening of fall-winter purchasing because of budget constraints.
2. The Vancouver Indie Collection approaches its first anniversary on May 13th with a slow-but-steady accumulation of titles (just shy of 300) and a healthy rate of circulation.

3. Our metrics have undergone a subtle shift of emphasis from volume to fulfillment, taking into account so-called “gap processes” (delays occurring between receiving, staging, cataloguing and shelf-preparation activities) as well as rates of productivity. This gives staff a clearer picture of the division’s performance under external pressures, lends context to unmet service needs and helps us better manage user expectations.
4. BSV continues its region-leading activity in the LC-PCC Name Authorities Cooperative. However, we have decided to forego opting into the SACO program at least until another library in our cohort with the staffing latitude to administer a Canada Funnel steps up to do so.

Staffing and Organization

1. Former Oakridge Branch Head Inness Campbell is now officially our Manager for Collections and Technical Services following the November retirement of TS Manager Chris Middlemass.
2. Lucy Zhang succeeds retiring Mei Fok as our part-time Catalogue Librarian for Chinese materials.
3. Cataloguing Assistant Lorraine Codville retires this month. We’ll recruit later this summer for her position.
4. Finally we bid a heartfelt fond farewell to retiring Acquisitions Assistant Manager Helen Lightfoot and welcome her successor Tara O’Coffey, who will also have Centralized Selections in her supervisory portfolio.

System-wide Update

1. The Level 8/9 reconstruction is almost complete. Tentative reopening date is September 20th, but that is likely to change. The Lower Level workspace re-organization project, more complex than previously envisioned, has been moved forward to December/first of 2019.

Thompson-Nicola Regional Library Report Submitted by Melissa Lowenberg

Late 2017, we completed an RFP for book delivery services. The delivery contract serves all but two of our 14 locations throughout the region.

In March, we shortened our name to Thompson-Nicola Regional Library, www.tnrl.ca. This name change had a variety of impacts from ILS servers to the ILL department. We are still working through all of the name changes which includes everything from using up old barcode stock to getting patrons to bookmark the new domain.

In April, the downtown Kamloops Library closed for a refresh for approximately 5 weeks. The Library was modified for a future coffee shop. The coffee shop proposal went out to public process. A One Desk service model was introduced and a new glass story time space was built. New paint, carpet, and three new meeting rooms are some of the other highlights. Patrons' response has been very positive.

We are awaiting the arrival of our new bookmobile. There will be a number of new stops, expanded schedule of days, a self-checkout, and programming. It should get rolling later this month. Pun intended!

Cataloguing projects:

- ScienceFlix MARC records
- CELA MARC records

We started a small project to re-sort how we display our current magazine subscriptions in Encore. Staff are changing the volumes in Sierra to reverse chronological now so that patrons can more easily place a volume hold on the latest issue of *People*.

University of Victoria Libraries – BCCATS Report – Spring 2018
Submitted by Dean Seeman – Head of Metadata, University of Victoria

HR news

- One of our cataloguers, Kris Polaski, retired at the end of 2017 (after 40 years). Karen Nelson moved into this permanent position.
- Laurie Whyte, who was with CUPE full time for the past several years, returned to the division as a cataloguer.
- We received support for a Serials Supervisor position and Susan Fraser-Mosky will move into that position from her serials assistant role on June 1st, 2018.
- Gail Fowler, our current cataloguing supervisor, will retire at the end of July and we are currently searching for her replacement.
- Two new Metadata Assistants will be joining the unit from elsewhere in the library system (Maggie Tan and Karen Dykes). They will begin their new positions on May 18th.

Cataloguing

- RDA Implementation is almost complete. We have documented our RDA cataloguing decisions in local RDA workflows within the Toolkit and are looking forward (not really) to seeing what changes will be made to the Toolkit and how that influences our local documentation.
- In 2017 UVic Libraries began the process of once again being active contributors to NACO. Most of the division participated in NACO training in September 2017. Karen Nelson is leading our efforts in this area for most material and cataloguer Min He is contributing records as part of the CJK funnel. A heartfelt thank you to

Linda Woodcock for all of her NACO help and guidance and to May Hmaidan for acting as our reviewer.

- We have been following BIBFRAME 2.0 developments with interest but have only informally experimented with the editor and convertor.
- Like most institutions we are considering options for our indigenous headings. We hope to employ a sustainable solution that allows for multiple views/viewpoints and suspect that a linked data solution may be the best way forward.
- In 2017 we completed a database cleanup and authority alignment project with Marcive. We continue to send our records to Marcive on a monthly basis to keep our authorities and headings up to date.

Digital Collection Metadata

- We have begun moving digital objects over to our instance of Samvera. This system uses Fedora4 and so is a native linked data repository. We are working on an IMLS grant funded project with the University of Houston and others to develop migration tools from CONTENTdm to Samvera.
- Samvera has also allowed us to think of moving to more linked data native practices, including assigning URIs at the point of metadata addition and the batch conversion of textual values to URIs.
- We have been involved with offering metadata support for several digital exhibits over the past year and continue to talk to colleagues in digital scholarship about how we can better support them. We have supervised grant funded metadata positions and offered metadata workshops.

Other

- Serials work is currently focused on serial disposition projects and cataloguing special collection material.
- We are working with Archives and Special Collections to help with the creation and migration of archival descriptions.
- UVic is still looking at ILS replacement options but we have decided not to issue a formal RFP as of yet.
- We continue to explore how to best leverage LOD practices in our traditional cataloguing and metadata practice. I see Wikidata as offering an incredibly robust and intuitive way to create and query linked data and we'll be exploring how to leverage Wikidata more in the coming year.

**Whistler Public Library
BCCATS Roundtable Report
May 2018**

Submitted by Suzanne Thomas

Technical Services

- We are participating in a Sitka pre-processing pilot project, receiving items from CVS and ULS shelf-ready.
- Adding non-traditional items to the collection: bike locks, bike maintenance kits, telescope, binoculars, games and more to come.
- We are going deweyless! Our travel section is now word-based, and cooking is to follow.
- Danusia Smit, our technical services assistant, retired and is not being replaced.

Library wide

- A Space Needs Assessment was completed to ensure that we continue to innovate and evolve to meet the needs of our community. A number of recommendations and proposed re-designs are under consideration.
- We are using Agile, the project management framework that builds on Lean manufacturing principles.

Learning Resources Services, Surrey Schools (SD36) **Samantha Bloomfield**

Catalogue

We are preparing for Destiny upgrade in early July (version 15.5); not waiting for v16.0 (release date is too late in summer for us to meet documentation deadlines for Sept startup and not confident there is enough time for Follett to properly debug on that timeline).

TCM

We continue to search for an appropriate replacement for our in-house catalogue/learning resource requisitions platform. We don't quite fit a full retail model but are trying to avoid custom solutions so it is proving to be a difficult find.

New Website (Digital Resources)

Redesign work has been delayed by other work but continues slowly.

District ebooks

Attempts to add to the district ebook collection were delayed and the funds redirected to other projects. Inquiries have been received from two district departments regarding development of a professional ebooks collection for specific staff groups, We have been investigating with Gale, Ebsco and Follett on their behalf.

Destiny Support

District wide technology and network implementations have led to unforeseen inconsistencies in equipment and network access levels in elementary libraries. We also continue to have account feedthrough problems with our SIS/HR databases.

District equipment pools

We are adapting to a new budget model and trying to reshape the replacements into an even distribution over four years.

New Schools

Salish Secondary will open in September. The library installation is underway. A new educational model for the school has led to structural design decisions in library that affect installation and we are uncertain of how it will go. A new elementary is scheduled to open in Sept2019. The installation team has been selected and selection/purchase/processing of library collection will begin in the fall. We have attempted to establish shelving and supplies estimates for planning purposes while prepping for these two installations.

Three additional schools (2 elementary, 1 secondary) will open in Sept2020. All classroom and library materials will come through our department during the 2019/2020 school year.

Special projects

District learning resource cost share timelines were shifted this year, with bulk of processing now taking place in spring rather than in the summer.

Staff

Two library techs returned from leaves. The department manager has been advocating for another library tech position to assist with the additional load of the new school installations.