

UC CONSER Funnel Communications survey, May 2008
Results, summary, and recommendations
By Renee Chin

The UC CONSER Funnel Steering Committee and Liaisons will participate in a conference call on May 16, 2008, to discuss and plan the next phase of the UC CONSER Funnel Program, now in its 2nd year. One of the areas that will be discussed is communication.

The UC CONSER Funnel Program was conceived in April 2006, as “an opportunity for any interested UC campus to obtain training and contribute serials cataloging to the national database in OCLC.” The program, modeled after existing NACO funnels, was a first step toward making UC cataloging a “single enterprise,” to continue building a cooperative approach to national bibliographic access, and to strengthen the community of UC catalogers.

As the UC CONSER Funnel Communications Coordinator, my initial charge was to establish the UC CONSER Funnel [discussion list](#) and [website](#), which were unveiled in June 2006. In January 2007, Rachel Barnhart (UCLA) set up the UC Funnel CONSER Standard Record [blog](#) which I also maintain as part of my communication duties. My long term goals were to help create and strengthen a “community of UC catalogers” using various communication strategies to ensure that UC catalogers could easily consult with other UC and CONSER colleagues on serials cataloging problems and challenges. Presumably, shared communication would improve common understanding of cataloging/metadata within the UC community, promote awareness of special strengths in the UC cataloging community, and support consistent system-wide cataloging standards and policies.






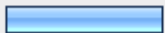
Recent annual CONSER statistics point to the success of the UC CONSER Funnel program in the area of training, though it has been unclear to me, whether the area of communication has met participants’ needs and expectations. On May 6, 2008, I devised a ten question survey to evaluate the role of communications within the UC CONSER Funnel. The survey was designed using SurveyMonkey.com and consisted of a combination of multiple choice questions that included rating scales and free text comments. Questions 1-3 dealt with general communications, questions 4-6 tackled issues related to the UC CONSER Funnel discussion list, questions 7-9 evaluated the UC CONSER Funnel website, and question 10 measured overall satisfaction with UC CONSER Funnel communications. The survey was announced on the UC CONSER Funnel Discussion List and participants were given one week to respond. I would like to thank Valerie Bross (UCLA), Melissa Beck (UCLA), and Sarah Gardner (UCD) for their initial feedback and comments on the survey.

The organization of this report parallels that of the survey. With the exception of the first question, results will appear first, followed by a summary, and my recommendations to the UC CONSER Funnel Steering Committee and Liaisons.

I would like to thank all Funnel participants who responded to this survey. In addition to giving me a new focus, your responses helped clarify many unanswered questions that will help make my job a lot easier.

Summary: The first question was a general demographic question to ensure fair representation across the UC campuses. My goal was to receive at least one response from each participating campus (**NOTE:** at the time of the survey, UCR and UCSC were in the process of becoming members and UCM and UCSF were not yet members of the UC CONSER Funnel).

Of 62 participants, a total of 24 members (33%) responded to the survey. However, only 21 of those responses counted towards the final analysis due to 3 incomplete surveys. The campus breakdown for the 21 respondents is as follows:

1. What is your campus affiliation?				
			Response Percent	Response Count
UCB			9.5%	2
UCD			19.0%	4
UCI			14.3%	3
UCLA			9.5%	2
UCM			0.0%	0
UCR			0.0%	0
UCSB			9.5%	2
UCSC			0.0%	0
UCSD			38.1%	8
UCSF			0.0%	0
			<i>answered question</i>	21

Recommendation: n/a

(next page)

2. What are the most common types of questions you have about serials cataloging? (Please choose all that apply)			
		Response Percent	Response Count
Serials cataloging tools and documentation (CONSER Cataloging Manual and Editing Guide, LCRI, AACR2, etc.)		42.9%	9
Pre-AACR2 or latest entry cataloging		28.6%	6
Creating original records		28.6%	6
Serials record maintenance		71.4%	15
Online serials		57.1%	12
CONSER Standard Record		71.4%	15
Special serials formats (microform, newspapers, rare materials, etc.)		38.1%	8
NACO/authority work for serials		19.0%	4
Local serials cataloging issues		28.6%	6
Integrating resources		23.8%	5
Other (please specify)		9.5%	2

Summary: The serials cataloging issues that participants have the most questions about are serials record maintenance and the CONSER Standard Record (tied at 71.4%), followed by online serials (57.1%), and serials cataloging tools and documentation (42.9%). In the “other” category, respondents added the following 2 areas as eliciting the most frequent questions: 1) URLs and URL maintenance, and, 2) Local policies involving all issues listed above.

Recommendation: I will create a follow-up survey to identify participants’ areas of expertise. My goal is to pool and promote awareness of UC catalogers’ strengths so that participants may be encouraged to post questions, problems, and examples to the discussion list for either their own benefit, or for all to benefit.

Funnel trainers may also use the responses to help identify areas of continued training and documentation development.

3. Currently, the UC CONSER Funnel has its own listserv, website, and blog but we are unsure whether these are the most desirable or efficient means of communication. Which of the following medium/media do you prefer to use, or would like to explore, for communications within the UC CONSER Funnel Program?

	Would not use at all	Would consider using	Definitely use	Rating Average	Response Count
Listserv	0.0% (0)	21.1% (4)	78.9% (15)	2.79	19
Website	0.0% (0)	31.6% (6)	68.4% (13)	2.68	19
Individual email and/or phone calls to reviewers or other participants	12.5% (2)	18.8% (3)	68.8% (11)	2.56	16
Conference calls with reviewers and/or other participants	20.0% (3)	46.7% (7)	33.3% (5)	2.13	15
RSS feeds by email	35.3% (6)	47.1% (8)	17.6% (3)	1.82	17
Blog	37.5% (6)	37.5% (6)	25.0% (4)	1.88	16
Wiki	16.7% (3)	66.7% (12)	16.7% (3)	2.00	18
Other (please specify)					0



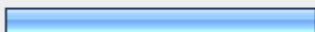
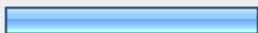

Summary: This question assessed respondents’ preferences of various communication methods. For practical reasons, none of the media listed above require special systems requirements and assumes that all participants have access to email, the internet, and/or a telephone.

Based on the responses, current methods of communication within the Funnel (Listserv, website, individual email and phone calls) are favored above all others listed and considered to be the most efficient. Overall, it would be disadvantageous to have too many choices because most participants do not have the time to check resources beyond their daily email and voicemail.

Recommendation: At this time, I will not explore other methods of communication (RSS feeds, blog, and wiki), in favor of utilizing and making the most of what we currently have in place. However, the UC CONSER Funnel Steering Committee and Liaisons might consider the following:

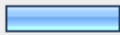



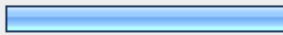

1. The possibility of arranging future conference calls between reviewers and/or participants as needed, since this was the 4th most popular/preferred method of communication.
2. Reevaluate the role and usefulness of the CONSER Standard Record blog since 37.5% of respondents indicated they would not use a blog. I recommend directing all future UC CONSER Funnel discussions regarding CSR to the discussion list.

4. How do you use the UC CONSER Funnel discussion list in your day-to-day serials cataloging work? (Please choose all that apply)

		Response Percent	Response Count
As a first-stop resource for quick serials cataloging questions (the ones where you think, I know I've seen that documentation before, but where did it go?)		14.3%	3
To share and/or obtain information about workshops, conferences, meetings, and continuing education opportunities that may be of interest to participants		28.6%	6
To share and/or obtain information about policies, practices, activities and documentation both regionally (SCP) and nationally (CONSER/NACO/PCC)		76.2%	16
To share and/or learn about what other UC serials catalogers are doing locally		61.9%	13
I do not use the UC CONSER Funnel discussion list for my day-to-day serials cataloging work		14.3%	3

Summary: Responses indicate that participants use the Funnel discussion list mostly as a vehicle to share and obtain information about serials cataloging policies (76.2%), rather than a resource for daily cataloging questions (14.3%), or to share/obtain information about conferences, workshops, etc. (28.6%). There also appears to be much interest (61.9%) among participants to learn about what other UC serials catalogers are doing locally. One respondent indicated that he/she would use the discussion list for daily serials cataloging “if there was greater participation by other campus catalogers.”

Recommendation: UCSD catalogers should continue to share and report content of local cataloging discussions via the UC CONSER Funnel discussion list. Other campuses are encouraged to do the same and to ask questions about local practices when they arise.

5. Which of the following statements most accurately describes your participation on the UC CONSER Funnel discussion list? (Please choose all that apply)			
		Response Percent	Response Count
I have previously posted questions/comments to the UC Funnel Discussion list		28.6%	6
I prefer to post questions and participate in discussions on other lists such as CONSER- or Serials list, AUTOCAT, etc.		0.0%	0
I prefer to utilize local resources first (colleagues, print/online serials cataloging tools, etc.) for my serials cataloging needs		57.1%	12
I prefer to ask questions directly of my UC CONSER Funnel reviewer or trainer		52.4%	11
I feel uncomfortable posting to a public forum		14.3%	3
I read and keep up with the discussions on the list but do not actively post		71.4%	15
I do not have time to participate on the list, either as a lurker or poster		4.8%	1
I do not participate on the list because of technological challenges		0.0%	0

Summary: Whereas question #4 examines how participants use the discussion list, this question #5 identifies reasons why participants may not utilize the discussion list for day-to-day cataloging.

Based on the response to the last question, we can assume that participants are familiar with listserv technology and etiquette but are not utilizing the discussion list for other reasons. Namely, they utilize local resources for cataloging help (57.1%) or they contact their reviewer or trainer directly (52.4%). On a positive note, 71.4% of participants revealed that they do read and keep up with the discussions on the list even if they do not actively post themselves.

Recommendation: n/a

6. What would encourage you to participate more actively on the discussion list?

There were 11 responses to this question which are summarized below (some responses contained more than one idea):








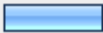
- If I had questions/answers/information/opinions to share/contribute (4 responses)
- If there were more topics/discussions that better related to my job (2 responses)
- If questions could be posted anonymously (2 responses)
- If more catalogers initiated discussion items (2 responses)
- Difficulty implementing SCP practices or policies (1 response)
- More time in the day (1 response)
- Not sure (1 response)

Summary: It had been my personal observation for the past year that the discussion list was not being utilized to its potential as a vehicle of communication, in particular, for UC catalogers to share serials cataloging issues. However, responses to this survey reveal that a lack of list activity does not automatically translate to communication inefficiency, lack of relevance, or lack of interest. Responses revealed a variety of practical reasons why participants do not post to the discussion list. As one respondent wisely implied, participants probably already utilize the list as their needs dictate, whether as a lurker, a poster, both, or not at all.

One respondent suggested periodically hosting specific topics for discussion so that catalogers could share their thoughts if the topic interested them.

Recommendation: I may call on volunteers to host discussion topics in the future.

7. Which of the following statements most accurately reflects how you use the UC CONSER Funnel website? (Please choose all that apply)

		Response Percent	Response Count
I use the website to find general information about the UC CONSER Funnel Program		57.1%	12
I use the website to find information about meetings, conferences, and workshops related to the Funnel		9.5%	2
I use the website as a reference tool (e.g., to refer to UC CONSER Funnel training documentation)		61.9%	13
I use the website to find information about the UC CONSER Funnel Discussion List		14.3%	3
I use the website to find contact information for UC CONSER Funnel Participants		19.0%	4
I use the website to link quickly to related resources such as the CONSER Program or SCP websites		4.8%	1
 I do not use the UC CONSER Funnel website because... (please specify):		23.8%	5

Summary: In general, fewer participants make use of the website than the discussion list. As time is of the essence, participants relied more on the discussion list than the website to obtain the information they needed. However, the Funnel website does serve a different useful role as participants visit the website most frequently to make use of available documentation (61.9%) and obtain information about the UC CONSER Funnel program (57.1%).

Recommendation: Evaluate and review the website for organization and content. For starters, I recommend removing the Announcements & Calendar section from the website. This information should be posted to the discussion list instead since 28.6% of respondents rely on the discussion list for this information versus 9.5% on the website. The Announcements & Calendar section has also been difficult to maintain for currency.

In addition to site handouts, any other documentation previously posted to the discussion list (e.g., most recent example: the aggregator neutral record cheat sheet) could also be included on the website so that catalogers only need to look in one place to find available documentation.

One final matter of concern was that at least one participant was not aware that the UC CONSER Funnel had a website presence. To remedy this, I will continue to post announcements to the discussion list whenever I update the website.

8. There are 2 undeveloped sections on the UC CONSER Funnel website. To help us determine whether to further develop these sections, how would you rate their usefulness to the overall UC Funnel website?							
	Not useful	Somewhat useful	Useful	Extremely useful	N/A	Rating Average	Response Count
Frequently asked questions (FAQ)	0.0% (0)	14.3% (3)	23.8% (5)	47.6% (10)	14.3% (3)	3.39	21
CONSER Voices (podcasts)	15.0% (3)	30.0% (6)	10.0% (2)	10.0% (2)	35.0% (7)	2.23	20

Summary: Most participants felt that a FAQ section would be useful. None considered it “not useful.” Responses for the CONSER Voices (podcasts) were mixed and the majority of respondents considered it “not applicable.” Individual comments did reveal a curiosity about the CONSER Voices podcasts.

Recommendation: It might be worth devoting some time to developing the FAQ section on the website. To do this, we will need a few volunteers to work on compiling and organizing the FAQ. I will send out a call to the list for volunteers in the near future.

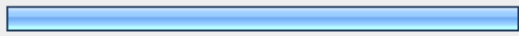


The CONSER Voice podcasts project had been deferred due to other commitments. I would like to ask the UC CONSER Funnel Steering Committee and Liaisons to review the status of the project.

9. What information do you find helpful or lacking from the UC CONSER Funnel website?

Summary: Of the 5 responses to this question, three participants indicated they would like to see the FAQ section developed. Another participant responded that he/she wanted to see more information on the website that related directly to their job, and a 5th responded he/she does not use the website.

Recommendation: (see recommendations for question #7-8)

10. Generally speaking, do you feel that you can sufficiently, efficiently, and conveniently communicate and interact with other Funnel participants through the current methods of communication available to UC CONSER Funnel participants? (e.g., listserv, website, blog)

		Response Percent	Response Count
Yes		90.5%	19
No		9.5%	2
How can we improve communications? 			4

Summary: The majority of respondents (90.5%) indicated they were content with the current methods of communication within the Funnel. There were 4 comments, one of which reiterated the need to continue utilizing the website and listserv but not to explore new communication methods such as blogs and wikis. Another cited lack of time as an obstacle to general participation in the Funnel program. Two other comments yielded additional ideas to consider such as conducting more surveys, and facilitating annual or biannual meetings between the campuses. In particular, inviting a speaker or trainer to facilitate and discuss catalogers' specific issues, or being able to address issues (such as local holdings records) in the context of the UC WorldCat Local pilot with other campuses.

Recommendation: I will be conducting more surveys in the future.

I will ask the UC CONSER Funnel Steering Committee and Liaisons to consider the idea of facilitating annual/biannual meetings between the campuses.

Conclusions: In general, the survey revealed that the majority of participants are currently making the most of the Funnel discussion list and website as it applies to them. The answers were helpful in affirming that our communications are working and not off-track as previously thought.

In planning for the next phase of the UC CONSER Funnel program, we now have some new and interesting ideas to discuss and test (e.g., conference calls, meetings, discussion topics, more surveys, etc.) and participants can look forward to continued discussions on the listserv, and more relevant content on the website.