Cataloging Committee meeting minutes – June 8, 2017

Link to join.me recording: https://recordings.join.me/7wMrZt6fdkyGslj2TX6Yag

Cataloger training and assessment project – with Dr. Sonia Archer-Capuzzo

I. Training development contract and proposed structure - April

April discussed training development contract and proposed structure referencing the Contract with Dr. Sonia document. Also talked about the timeline for teaching classes and assessments.

Discussed the relationship to the staff permissions project and showed the Staff Permissions Restructure document. Discussed the impact of the work of the Authorities working group on cataloging best practices (with standards for subject headings) and seeking bids for vendor contract to implement authority control and maintenance on the NC Cardinal catalog.

Martha asked if we could call the Copy Cataloger an Item Cataloger to avoid confusion to clarify that this level is only affecting item records. The other committee members present supported that change.

II. Project plan and design/development questions – Sonia

Dr. Sonia Archer-Capuzzo asked questions about the cataloging committee vision of the training development. She would like to have a comprehensive definition of what an Item Cataloger should do and what a Bib Cataloger should do to define their roles and develop training based on those definitions. Martha said that Item Catalogers should be able to add/edit/delete volumes and items and to know matchpoints to determine they are adding their items to the right record. Her staff (Item Catalogers) do add brief records for acquisitions when creating purchase order, but not the full bib records once the orders come in. Bib Catalogers should be able to do everything else.

While most instructions will relate specifically to Evergreen, Dr. Sonia asked if any other subjects should be included, adding Dewey numbers, subject headings (check with Authorities working group), following specific cataloging rules? Martha suggested instructions on loading records without creating multiples and not transforming a record from one type to another (regular print to large print, dvd to blue ray, etc.). Should download a new record for the right thing, instead of trying to turn one record into a different kind. She asked whether paperbacks and hardcovers be on the same record, even though they are not entirely the same thing. Nicole mentioned the resource sharing costs of sending multiple items if patrons place holds on many records for the same book/dvd. Martha says she doesn’t change the existing record (such as by adding the ISBN for her particular version) when she adds to a record, she just adds her item. I asked whether the it would be best to specify that combined (hardback/paperback) records should be only for fiction and should not be for non-fiction and reference materials (because GHL would not support). Discussion of dvds, whether widescreen or full-screen should be on different records. Martha puts both on the same record (so long as the same number of discs) but doesn’t alter the record, while Nicole would put hers on separate widescreen and full screen records to avoid patron complaints. Sonia asked about providing some introductory information in BP and refining MARC templates, as well as list of things that catalogers could/should edit and what should not be changed and any RDA fields. Discussed whether Evergreen incorporates all elements of RDA and the timing of our next Evergreen version upgrade. RDA enhancement will also be included in the Authorities control vendor contract. Sonia asked for as much feedback as possible to help keep her in line with our vision.

III. Communication plan and timeline for project – Benjamin

Benjamin asked and everyone confirmed they are comfortable using Google docs. He described use of Suggesting (vs Editing) documents in the dropdown menu to allow folks to add a suggestion, rather than
changing text to get input and discussion from others. Discussed having monthly calls and an in-person meeting after Sonia provides drafts on August 15. We might meet somewhere in the west, since many of the committee members are located in that part of the state. After September, we will begin scheduling classes and options to test out of in-person training by taking the assessment.

IV. Cataloging committee contribution - April
   a. Please add information to identify current and past cataloging issues as fully and quickly as possible – “Things to include in training” document in the shared folder
   b. Topics in Best Practices needing expansion – please document those in the draft BP document itself

Discuss UNCG students as volunteers to help with catalog cleanup – could be very helpful for manual clean-up tasks or looking at/evaluating individual records. Dr. Sonia says most of the students are distance-learning and may be in the area of any library in the state. Many of them would love to get experience on their CV! Catalogers could let Sonia know if they have a task that would be appropriate and she would put it out on the student listserv. Might be some online opportunities sending documents back and forth. Will explore publishing this on our NC Cardinal listserv.

Dr. Sonia Archer-Capuzzo left the meeting.

Other NC Cardinal cataloging topics

V. Presentation at annual meeting and new/departing committee members – Benjamin

Annual meeting is July 28th and we will be talking about committee activities over the course of the year and the cataloger training project. Asked about cat committee activities: included hammering out the consolidated lists for shelving locations and circ mods. Discussed changes to the makeup of the committee. Benjamin thanked Martha and Nicole for their 3 years of service. Serenity has served 2 years and has the option to renew service for one more year. So, we will be asking for nominees to fill the slots and may ask for input on the role of committee members. Nicole asked if the Cat Committee members are invited to come to the annual meeting. Benjamin said he will check into the budget to see if that is an option.

VI. Written cataloging policy to submit to Governance Board – April

There are examples of cataloging policies for other consortia in our shared folder and April will work on a draft of a policy for NC Cardinal to submit to the Governance Committee for a vote.

VII. Method to batch import without overlaying a good record – April & Benjamin

Will be testing a potential solution to the problem of overlaying a good, complete record that a cataloger has spent time enhancing with a mediocre vendor record. It may be feasible to distinguish an untouched brief record using a specified tag in the MARC that is removed when the record is overlaid or filled out with a more complete record. Then, vendor records batch imported would have to match on that term in the brief record before overlaid. Martha says that staff search for the record before they create a brief record (and put the title in all caps). Martha batch imports OCLC records assuming that those are the best records. We believe the issue that has generated complaints is not with OCLC records, but with vendor records that may not be as full or complete as the work done manually by a cataloger, who finds it frustrating to see that work overlaid.

VIII. Vendor minimum bib record standards – discussion

Some vendors may not actually be giving us very good records (may be providing records out of our own or someone else’s catalog), without meeting any particular established standard. Do we need to create a minimum
standard with required fields and tags? This can be a particular problem with AV vendors. Martha mentioned that e-resource records can also be a problem. Since NC Cardinal doesn’t have a contract with the vendors, it would be up to individual systems to require this standard from their vendors or make sure that any records they upload meet the minimum standard, but the consortium should require that this standard be met (either by the vendor or by the cataloger uploading). Serenity and Nicole mentioned that there may be some pushback, but the discussion is definitely worth having. It is a growing problem.

IX. Method to get systems to correct bib records (when they have holdings) and report on cataloging errors – discussion regarding accountability/adherence

As we establish cataloging standards, how do we address accountability on a system level? We have seen records without ISBNs that come in during migrations that will never be merged in a scripted dedupe because there is not enough good information to match on. Benjamin said that he hopes, in future, to be able to do some advanced SQL reporting with potential email notifications about errors in item or bib records for cleanup. It would be an automated way to notify libraries that a record with their holding needs to be improved/corrected. Serenity suggested that the directors need to be involved and on-board with accountability. Discussed having this as a roundtable and breakout session at the annual meeting. There has previously been some pushback from Governance Committee and directors who questioned the way accountability might affect their systems. Accountability is the next logical step in the assessment process, but directors want to be sure that their staff can go on as usual. How do we ensure that staff are able to do that while still attaching items and deleting them correctly to limit the issues that we have to deal with as a consortium? If someone doesn’t pass assessment, they will get additional training and mentoring. As a further concern, how do we ensure that (even if catalogers pass the test) they consistently following best practices? Unique logins make it more obvious who is doing what in the catalog, but no one is really checking behind catalogers within their own system. Worth discussing again at the annual meeting. Benjamin said that the discussion was beneficial to him. Nicole mentioned the financial cost of not complying, in staff time for catalogers to clean up behind one another and for multiple items to be shipped for resource sharing.

X. Cataloging updates - April
   a. Authority control vendor services RFP (Request for Proposal) will go out in the next fiscal year and will incorporate subject heading standard recommendations
   b. Permissions project meetings with System Login Access Managers from each system in the consortium – will set up some meetings to talk about how systems are using permissions to get their work done. Cataloging Committee will make recommendations for the restructure. Circulator II and Circ Supervisors are granted some cataloging permissions that may shift back to cataloger permission group and staff who perform those functions will need to have training. April will post the full list of permissions to the Cat Committee folder.
   c. AV and electronic record dedupe – just setting up timeline and Rogan is running reports to evaluate data and discussing matching standards. Contract also includes the Consolidation Project, so both will conclude at the end of September. Catherine is the lead on the circ mod consolidation. Rogan is the Equinox developer working on both projects. We will be asking catalogers from every system to test very thoroughly. Will be working on a timeline with testing in July/August and go live in early September. Will get recommendations on downtime necessary depending on several factors.

Benjamin thanked everyone for their time and efforts, especially during the busy summer months. April will send out some potential dates for the next meeting for this and for a separate meeting with system login managers.