

2016

OLAC NEWSLETTER



Reading room in the Boston Public Library

Photo courtesy: [Timothy Neesam](#)

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THE OLAC NEWSLETTER

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EDITOR-IN-CHIEF

Marcy A. Strong
River Campus Libraries
University of Rochester
Rochester, NY 14627
mstrong@library.rochester.edu

ADDRESS AND EMAIL CHANGES

Autumn Faulkner
Michigan State University Libraries
566 W. Circle Drive
East Lansing, MI 48823
autumn@msu.edu

BOOK REVIEW EDITOR

Richard N. Leigh
Ball State University
University Libraries
2000 W. University Ave.
Muncie, IN 47306
rnleigh@bsu.edu

CONFERENCE REPORTS EDITOR

Jan Mayo
Joyner Library
East Carolina University
Greenville, NC 27858-4353
mayoj@ecu.edu

NEWS & ANNOUNCEMENTS EDITOR

T.J. Kao
Claremont Colleges Library
800 N Dartmouth Avenue
Claremont, CA 91711
tj_kao@cuc.claremont.edu

QUESTIONS & ANSWERS EDITOR

Jay Weitz
OCLC
MC 745
6565 Kilgour Place
Dublin, OH 43017-3395
weitzj@oclc.org

SPOTLIGHT EDITOR

Lisa Romano
Joseph P. Healey Library
University of Massachusetts
100 Morrissey Boulevard
Boston, MA 02125-3393
Lisa.Romano@umb.edu

Material for publication in the OLAC Newsletter should be sent to the appropriate editor. Persons wishing to review books should contact Richard Leigh and indicate their special interests and qualifications. For AV cataloging questions, contact Jay Weitz. Articles should be submitted in electronic form, using standard word-processing software, and consistent in length and style with other items published in the Newsletter. For further guidance, please check the [OLAC Newsletter Editorial Stylesheet](#). Persons wishing to nominate themselves or other OLAC members for *In the Spotlight* should contact Lisa Romano.

From the Editor

Marcy Strong

Happy 2016! Inside this issue you'll find a thorough recap of OLAC's activities at ALA Midwinter, held in Boston this past January. In addition to the OLAC Board, CAPC, and Membership minutes, there are ten separate conference reports to digest, full of updates from CC:DA, MAC, the Library of Congress, OCLC, MOUG, and several CAPC committees.

The coming spring also means that OLAC election time is right around the corner. Please take a few minutes to meet the 2016 [OLAC candidates](#) for office and be sure to vote in the election when your ballot arrives in April. This is also a good reminder to make sure that your OLAC membership is up-to-date so you can make your voice heard.

We are pleased to present a profile of [Rosemary Groenwald](#), who is a long-time contributor to CAPC projects, and [several briefer profiles](#) of members of the current CAPC roster. The OLAC enthusiasm is catching! If you're looking for a good book recommendation, swing by the [Reviews column](#) where you'll find reviews of four current cataloging titles. And, as always, Jay has the answers that you're looking for in his [Cataloger's Judgment](#) column.

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From the President

Stacie Trail



I hope this Spring issue of the OLAC Newsletter finds you all well. Here in Minnesota, I'm glad to see the snow melting and the temperatures warming. OLAC had informative and productive meetings at ALA Midwinter in Boston. The CAPC meeting hosted an excellent presentation by Kathy Glennan, ALA's representative to the RDA Steering Committee, who brought us up to date on ongoing developments with the management and revision of RDA. At the membership meeting, Annie Glerum shared her expertise on the RDA/ONIX Framework, including a demonstration of a web application she developed to show relationships among terms and categories. As always, both meetings provided valuable learning and discussion opportunities.

I'm extremely pleased to welcome a new member to the OLAC Executive Board: Matthew Burrell of Florida State University joined the board as OLAC Web Developer at the end of January. Matthew will be leading the rollout of OLAC's new website, and taking on leadership of the Web Steering Committee on an ongoing basis. I'd like to thank Teressa Keenan for her many years of service to OLAC as Webmaster. We've all benefited from Teressa's dedication to the ongoing work of managing OLAC's website.

Keep your eyes open for information on the upcoming OLAC Executive Board election. This spring we'll be electing a new Vice President/President-Elect and a new Secretary. I encourage all of you to vote when the time comes.

And now the sad news: as many of you have heard via either the membership meeting in Boston or recent discussion on OLAC-L, we were not able to secure a venue for the OLAC Conference that was intended to be held this fall. Although members of the conference planning committee and Executive Board went above and beyond to find a venue that would meet our needs for the 2016 conference, nothing came together in time to allow adequate planning before the likely conference dates. The Executive Board regretfully made the decision to postpone the 2016 conference while exploring other options for a conference in 2017. We all feel strongly about the value that the OLAC Conference offers to the organization and the cataloging community, and are committed to making the conference happen in 2017. But we need your input to help us ensure that the event meets your needs. I'd like to encourage all of you to [get in touch with me](#) or any OLAC board member to share your thoughts and ideas for the next OLAC conference.

From the Treasurer

Autumn Faulkner



Personal Memberships	256
Institutional Memberships	35
Total as of 1/5/16	291

	Quarter	FY-to-Date
Opening Balance	\$ 9,921.45	\$12,454.44
INCOME		
Memberships	\$ 2,334.00	\$ 3,075.81
EBSCO Subscriptions	\$ -	\$ -
TOTAL INCOME	\$ 2,334.00	\$ 3,075.81
EXPENSES		
Events		
Stipends	\$ -	\$ 800.00
Board Dinners	\$ -	\$ 195.60
Facilities	\$ -	\$ 743.56
Reimbursements	\$ -	\$ -
Subtotal	\$ -	\$ 1,739.16
Vendors		
Wild Apricot	\$ -	\$ 1,080.00
BluHost	\$ -	\$ -
PayPal	\$ 65.72	\$ 86.89
Survey Monkey	\$ -	\$ 204.00
Marketing/Design	\$ -	\$ -
Subtotal	\$ 65.72	\$ 1,370.89
Operations		
Conference scholarships	\$ -	\$ -
Research grant reimbursements	\$ -	\$ -
Awards	\$ -	\$ 115.00
ALA Affiliate membership	\$ -	\$ -
Overcharge adjustments	\$ -	\$ 70.00
Office supplies & postage	\$ -	\$ 45.47
Subtotal	\$ -	\$ 230.47
TOTAL EXPENSES	\$ 65.72	\$ 3,340.52
Closing Balance	\$12,189.73	\$12,189.73

From the Secretary: Meeting Minutes

Jennifer Eustis



OLAC Executive Board Meeting

ALA Midwinter Conference

Boston, MA

Friday, January 8, 2016

Present: Marcia Barrett, Jennifer Eustis, Annie Glerum, Autumn Faulkner, Mary Huismann, Stacie Trail, Jay Weitz

Absent: Liz Miller, Jeremy Myntti, Marcy Strong

1. Officer Reports:

- President's report (Stacie):
No report at this time.
- Vice President/President Elect's report (Annie):
The ALA Midwinter 2016 discussion will be on the RDA ONIX framework, what it is, and its role in describing non-print resources. This will be led by Annie who has 40 handouts for the Membership meeting. [A copy of the handout will be available in the newsletter as well.](#) As a member of the RDA ONIX framework working group and a liaison to OLAC, Annie and Stacie hope to broaden awareness of this issue and its implications.

The ALA Annual 2016 discussion is being worked on. One idea is to present an overview of RDA best practices as a suite of resources. This idea would focus on what they have in common and a brief word from the chairs of the RDA Best Practices Working Groups on how they are unique. This discussion idea will be discussed at CAPC later tonight. CAPC has been working on how to deal with all of these documents and also had a discussion at the last ALA Annual. For this idea, it would be best to wait for the new chair of CAPC. CAPC is also working on a style guide for the best practices documents. In addition to the question of whether these documents are useful if brought together, it would be good to know how else these documents could be repackaged. For this, the new chair of CAPC could get the

membership's opinions. Another discussion idea is to encourage a dialogue on how to catalog maps or catalog materials defensively. If this is the selected discussion, then we'll need to ensure that Jay can attend the membership meeting.

- **Treasurer's report (Autumn):**
Autumn is working with Bruce and Heather to find a way to change membership dates for those members who were migrated into the new system. Instead of the date of when these members originally become members, the date is the date when they were entered into the new Wild Apricot. The subscription to Blue Host was renewed. Money also comes from subscriptions through EBSCO for a paper copy of the newsletter. Autumn will investigate how much income this subscription provides.
- **Secretary's report (Jennifer):**
There is no report at this time.
- **Outreach/Advocacy report (Stacie for Jeremy):**
For the new OLAC logo, the original idea was to unveil it with the redesigned website. The website is still being redesigned. The Board decided that it is fine to use the new logo now on OLAC's social networks and the newsletter. Stacie, Jeremy, and Marcy will work on this.

The Members on the Move column will feature the 4 new CAPC full members and T.J. Kao who has a new position out in California. If you know of any members with new positions, please let Jeremy know.

We need your help for a Wikipedia page on OLAC. A call will be forthcoming looking for someone who knows Wikipedia and OLAC.

- **Newsletter Editor's report (Stacie for Marcy):**
Marcy is stepping down as the Newsletter editor. She has provided a revised description for the position and will help with the transition of the new person and training. This is an appointed position. A call will be forthcoming in the next couple of weeks.

2. Committee & Task Force Reports

- **Election Committee report (Stacie for Liz):**
There are two candidates for secretary but none for Vice President/President Elect. Liz and Marcia will put out some feelers and a call will go out at the Membership meeting. There was a question if a past president could be Vice President/President Elect again. The OLAC Handbook doesn't mention this and only states that an officer can't serve in two positions at the same time.

- Web Steering Committee report (Marcia):

To move the web redesign and maintenance forward, OLAC sought out a web developer or web master who is a member of the Board and two candidates applied. The Board has made a decision and will confirm with this person to verify the appointment. Once a new web developer is in place, the Board and committee will work with them on best practices on moving forward with the website design, enhancement, and maintenance. The Board also decided that the web developer will be the chair of the Web Steering Committee.

- CAPC report (Mary):

We have received four applications for full-member positions, and four applications for intern positions! These positions will need to be appointed at or shortly after Midwinter by the President. Terms will begin after ALA annual 2016.

Note that since we successfully “re-staggered” the terms, all future CAPC full-member position terms will return to two-year terms.

A new chair will need to be appointed, and Mary has given a recommendation to the President.

Task Force Reports

A brief update on the active groups:

- Playaways

The joint MLA/OLAC Playaways RDA best practices task force has broken the current AACR2 guide down and begun to rewrite each section for RDA. The task force has also identified new and revised Playaway products for future additions/revisions to the guide. The group hopes to have a substantial portion of the guide done before Annual, with completion and community review by Midwinter 2017. Rob Freeborn is the chair, and Jay Weitz is the group’s advisor.

- Games Preferred Titles (Joint TF with SAC)

A joint task force with SAC working on game headings (Greta de Groat, chair) was formed in March 2015 to address several issues regarding practices for preferred titles and authorized access points for games. Many of these issues came to the fore through the work of the Video Games RDA task force. The group’s final report was submitted to LC in August 2015, and they are awaiting LC’s response.

New Task Forces

This is on the agenda for the CAPC meeting. I would like to form three new task forces: for realia, other disc formats (e.g., DVD-ROM, CD-ROM), and spoken word. The latter could have representation from MLA, if desired. Mary has some folks in mind to chair

these groups, and would solicit volunteers from CAPC and the greater OLAC community with the desired skills.

Style Guide for CAPC Publications

The new style guide is almost ready to go. The guide should be applied to new CAPC RDA publications. Both the DVD/Blu-ray and Streaming Media guides exhibit the “look” of the guide. She has been collaborating with Teresa on the accessibility guidelines. Although the new guide is chiefly intended for the RDA publications, the accessibility guidelines should be applied to all CAPC publications.

Revisions and Updates to the CAPC RDA guides

As a follow-up from ALA Annual, Mary has been in contact with Richard Leigh (SMaCR chair) about how to tweak the review process to accommodate a quicker review/update of the RDA documents. He agreed that these documents do need a different review cycle based on the Toolkit update schedule. They agreed to the following process: for major Toolkit updates, SMaCR will contact the task force chair for guidance on updating the document. The chair will have the option to be involved, or not, and CAPC will help if needed.

Mary would like to put together a group/task force to examine how we might combine these various RDA guides into a more cohesive document. At this point, she would include Richard, the new CAPC chair, and volunteers (previous task force chairs, CAPC, etc.) as membership. The group should be appointed by Annual 2016. We also need to take into account the impending redesign of the Toolkit product – as was specifically mentioned in one source about the proliferation of community best practice documents.

Other CAPC work

CAPC has been involved with the CC:DA optical disc proposal discussed at the November RSC meeting and with preparation of MAC discussion paper on the addition of autonomous regions to the MARC 257 field. A small group is working with Kathy Glennan on a few relationship designators to be resolved before the moratorium begins.

New AMIA liaison needed

Our current liaison, Thelma Ross, announced that she has taken a new position and is no longer involved with AMIA. She had no recommendations for a replacement.

3. Discussion

- Nancy B. Olson award (Marcia):

The committee has received two nominations and have a recommendation approved by the Board. An announcement will be made soon.

- **OLAC Research Grant (Annie):**
The 2016 OLAC Research grant was announced in the December newsletter. Thus far, no applications have been submitted. A reminder will be sent out in February on various listservs.
- **Conference Planning (Stacie):**
We have not decided on a location. Autumn has offered to look into Michigan State. Annie has been looking into Florida State. The problem with both places is that because of the football schedules, they are both booked for the fall. The good news is that these are non-profit spaces where catering is separate. For Florida, the convention has a nearby hotel and places to eat. However, there is no major airport nearby. There is a concern about the timeline for a conference this coming fall. We also want to be careful about pricing. This is the reason to look into non-profit spaces. There are other ways to reduce costs and this will be discussed with the membership. The primary expense comes from hotels. There is an idea to look into having another joint conference with MOUG or have the conference after ALA.



OLAC Board dinner

Photo courtesy: Stacie Traill

OLAC CAPC Meeting
ALA Midwinter Conference
Boston, MA
Friday, January 8, 2016

Present: Cate Gerhard, Rosemary Groenwald, Jessica Hayden, Mary Huismann (chair), Kelley McGrath, Patricia Ratkovich, Jessica Schoenberg, Trina Soderquist, Janis Young, Jay Weitz

Others attending: Bruce Evans, Annie Glerum, Autumn Faulkner, Bryan Baldus, Marcia Barrett, Ivan E. Calimano, Shi Deng, Thomas Dukleth, Jennifer Eustis, Kevin Furniss, Kathy Glennan, Tina Gross, Jeannette Ho, Caitlin Hunter, Beth Iseminger, Andrea Leigh, Maria Mastromonaco, Laurie Neuerburg, Jim Soo Nyun, Karen Peters, Neil Robinson, Amanda Ros, Stacie Traill, Michele Zwierski

4. Welcome and Introductions (Mary Huismann):

5. Approval of minutes:

The minutes from the [meeting held at ALA Annual 2015](#) were approved.

6. Announcements:

No announcements at this time.

7. Presentation (K. Glennan, ALA representative to the RSC):

A formal report on the last 6 months of activity is available on the [CC:DA blog](#) and concerns primarily RDA governance changes. There is a change in name, from JSC to RSC or RDA Steering Committee. The governance structure is also being modified. There will no longer be an ALA representative, only a single representative for North America. The restructuring will involve rethinking this new hierarchy and which representative to send to this body. Of course there will still be the CC:DA. Instead of going directly to the JSC, there will be an additional layer to bring concerns to RSC. Currently RSC is speaking to multiple groups to ensure buy-in for this structure. While this process is going on, Kathy is the new representative for North America.

The ALA proposal number 44 on optical discs wasn't approved by JSC (RSC). There was a difference of opinion on where the problems were concerned and how to solve them. OLAC tried to address some of these issues with instructions in RDA. Others saw a need to address technical standards. Where is the right place to address software instead of hardware? CC:DA evaluated the proposal and had separate instructions for production method for optical discs. Because of the different approaches, a revised proposal was brought forth consisting of a table to clarify differences with optical discs that helped identify a carrier's software and hardware. The major concern raised with this revision was that the optical disc should be addressed by encoding standards. If separate elements are needed, then a revision of the terms in the encoding list could be an option and more general instructions. There was a request to add "XBOX" and "PlayStation" but this was seen as too granular and the terms too difficult to define

in the glossary. This revision was rejected though “stamped” and “burned” were added to the glossary. That the encoding format vocabulary needs work has the potential for a new working group to rework the vocabulary.

There is a moratorium on fast track proposals for relationship designators. Fast track was used for consistency and accuracy of designators. The addition of terms was user driven. The RSC currently has no standards for the addition or proposals of designators. The proposal to restructure Appendix K didn't go through and a working group was created to investigate. The moratorium will be lifted once this working group has finished its investigation, sometime in December 2016.

There is an ongoing consolidation and revision of the three standards, FRBR, FRAD, and FR SAD. Changes to the model reflect insights and reconciliation of approaches. IFLA begin this work in 2010 for a review ready for the conference in Columbus, OH. Worldwide review will be ready perhaps for March 2016. FRBR-LRM is an extension of that model focused on user tasks not library functions. It is extensible and types are expanded by entities. Group designation will be removed. Work, manifestation, expression, and item are still the core of this model. “Person” is being revised as a subclass where it refers to an individual human not an animal or fictitious character. “Place” will be replaced to be its own entity. “Res” is the new name for theme and a single top level entity. “Nomen” is being merged with FRAD “name” and is an access point. Nomens are a way to name a person or a work. Identifiers are nomens. Entities have a hierarchical relationship. There's a greater emphasis on relationships. A new concept is a representative expression. If the original expression is known, it can serve as the norm for other expressions for language, key, scale, etc. All of these revisions and more will change RDA itself.

8. Liaison Reports:

- [CC:DA Report](#) (K. McGrath):

RSC is pulling back from adding vocabularies to RDA. ALA will be pursuing how to create their own list and is looking at vocabulary extensions for communities to use. One direction RDA is going is to move to general and specialized application profiles. There is an aggregate working group where every aggregate has a creator. Region coding doesn't have a vocabulary. Would it be feasible to propose this? Each term should have a unique glossary definition that goes beyond carrier and have broader implications.

Announcement: MASHCAT is in Boston for ALA Midwinter 2016. Some of the [slides](#) will be posted.

- [MAC Report](#) (C. Gerhart):

There are 16 discussion papers and two proposals. This report will only cover those of interest to us. The first proposal is from the Canadian Music Association and asks to revise the 007 to add fields for remote sound. This would help with remote standalone devices like Playaways. Question: Are they planning an equivalent for video? Unknown. The second proposal is from the Music Library Association and asks to revise the field 382 to include more codes and the subfield r. This subfield would be for the number of performances in addition to ensembles, number of ensembles. Also there is a request for a subfield e for the number of ensembles of the same kind.

Discussion papers:

- Music Library Association (MLA) would like to add the subfield 3 to field 382.
- MLA would like to clarify code values for 008/20 (Format of Music) and how that aligns to RDA.
- OLAC and MLA suggest defining a new first indicator for distributor numbers in the 028 field as there's a need to distinguish publisher from distributor numbers.
- The Game Metadata Citation project would like to clarify terminology and a way to include a source thesaurus by adding a subfield 2 and 0 to field 753.
- The places/countries paper asks to broaden the definition of the field 257 to include semi-autonomous regions like Hong Kong.
- The 046 subfield k paper discusses the vagueness of the instructions to say if there is a date present to not add the date in this field. This paper discusses removing this restriction.
- CONSER is asking to add the field 347, digital file characteristics, to holdings records. This is important for provider neutral records where there can be various digital file characteristics.

- [LC Report](#) (J. Young)

- [OCLC Report](#) (J. Weitz)

- [MOUG Liaison Report](#) (K. Peters)

- AMIA Liaison Report (M. Huisman):

The current liaison has stepped down. We are looking for a replacement and an announcement will be forthcoming.

9. Subcommittee, Coordinator Reports

- [Subcommittee on Maintenance for CAPC Resources](#) (M. Huismann for R. Leigh)
- [NACO AV Funnel Coordinator Report](#) (M. Huismann for P. Lisius)

10. Task Force Reports

- [Audiovisual Materials Glossary Update Task Force](#) (M. Huismann)
- [Joint SAC/OLAC Games Preferred Title Task Force](#) (G. de Groat)
- Video Games Genre Task Forces (C. Gerhart)

The white paper is done and will be shared for revisions. If the task force wants, a draft can be shared with CAPC.

- [Joint MLA/OLAC Playaways RDA Best Practices](#) (M. Huismann)

11. New Business

- New RDA Best Practices Task Forces (M. Huismann)

Three areas have received the most feedback for a best practices document: realia, other disc formats, and the spoken word. CAPC will be looking into creating these task forces. The one for the spoken word likely consult with the Music Library Association.

12. Adjournment

Question: Is there an intention to add FRBR LAM to RDA wholesale?

Answer (K. Glennan): The revision of FRBR, FRAD and FR-SAD is a multiyear project that needs approval. RDA will change as soon as this happens but will also mean rewritings and revisions.

OLAC Membership Meeting

ALA Midwinter Conference

Boston, MA.

Saturday, January 9, 2016

Present: Bryan Baldus, Marcia Barrett, Jennifer Eustis, Bruce Evans, Autumn Faulkner, Rosemary Groenwald, David Miller, Karen Peters, Amanda L. Ros, Stacie Traill, Jay Weitz, Eric Willey

13. Welcome and Introductions

14. Announcements:

- Executive Board elections (Stacie Traill for Liz Miller):
We have two nominations for OLAC Secretary. We are still looking for nominations for Vice President/President Elect. If you would like to run or know someone who is interested, email Stacie or Liz. The office of Vice President/President Elect is a 4-year commitment and very rewarding.
- Call for Newsletter Editor (Stacie Traill):
Our current newsletter editor, Marcy Strong, will be stepping down. A call for applicants will be sent out soon. Marcy will work with the incoming editor. We encourage you to nominate yourself or someone you think is great of this position.

15. Reports:

- President's Report (Stacie Traill):
No report at this time.
- Vice President's Report (Annie Glerum):
The ALA Midwinter 2016 discussion will be on the RDA/ONIX Framework, what it is, and its role in describing non-print resources. This will be led by Annie who has 40 handouts for the Membership meeting. A copy of the handout will be available in the newsletter as well. As a member of the RDA/ONIX Framework working group and a liaison to OLAC, Annie and Stacie hope to broaden awareness of this issue and its implications.

The ALA Annual 2016 discussion is being worked on. One idea is to present an overview of RDA best practices as a suite of resources. This idea would focus on what they have in common and a brief word from the chairs. This discussion idea will be discussed at CAPC later tonight. CAPC has been working on how to deal with all of these documents and also had a discussion at the last ALA Annual. For this idea, it would be best to wait for the new chair of CAPC. CAPC is also working on a style guide for the best practices documents. In addition to the question of whether these documents are useful if brought together, it would be good to know how else these documents could be repackaged. For this, the new chair of CAPC could get the membership's opinions. Another discussion idea is to provide a discussion on how to catalog maps or catalog

materials defensively. If this is the selected discussion, then we'll need to ensure that Jay can attend the membership meeting.

- Treasurer (Autumn Faulkner):
Our current balance is \$12,189.73. OLAC has 256 personal memberships and 35 institutional memberships coming to a total of 291 members.
- Secretary (Jennifer Eustis):
No report at this time.
- Outreach/Advocacy (Stacie Traill for Jeremy Myntti):
If you use OLAC's social network, remember to follow us and like us. OLAC's social media will be updated with the new logo soon along with the newsletter. If you have news to share for the Members on the Move column, let Jeremy know. Also, if you have experience working with Wikipedia and would like to help create an OLAC Wikipedia page, please contact us.
- Newsletter Editor (Stacie Traill for Marcy Strong):
Marcy is stepping down as the Newsletter editor. She has provided a revised description for the position and will help with the transition of the new person and training. This is an appointed position. A call will be forthcoming in the next couple of weeks.
- CAPC/MOUG (Mary Huismann):
We have received four applications for full-member positions, and four applications for intern positions! These positions will be appointed at or shortly after Midwinter by the President. Terms will begin after ALA annual 2016. A new CAPC chair will be appointed as well.

Note that since we successfully "re-staggered" the terms, all future CAPC full-member position terms will again be two-year terms.

Task Force Reports

A brief update on the active groups:

Playaways

The joint MLA/OLAC Playaways RDA best practices task force has broken the current AACR2 guide down and begun to rewrite each section for RDA. The task force has also identified new and revised Playaway products for future additions/revisions to the guide. The group hopes to have a substantial portion of the guide done before Annual, with completion and community review by Midwinter 2017. Rob Freeborn is the chair, and Jay Weitz is the group's advisor.

Games Preferred Titles (Joint TF with SAC)

A joint task force with SAC working on game headings (Greta de Groat, chair) was formed in March 2015 to address several issues regarding practices for preferred titles and authorized access points for games. Many of these issues came to the fore through the work of the Video Games RDA task force. The group's final report was submitted to LC in August 2015, and they are awaiting LC's response.

New Task Forces

New task forces to prepare best practices for RDA cataloging are under consideration, most likely on the following topics: realia, other disc formats (e.g., DVD-ROM, CD-ROM), and spoken word.

Revisions and Updates to the CAPC RDA guides

As a follow-up from ALA Annual I've been in contact with Richard Leigh (SMaCR chair) about how to tweak the review process to accommodate a quicker review/update of the RDA best practices documents.

CAPC will also explore how we might combine our various RDA best practices guides into a more cohesive document, keeping in mind the impending redesign of the Toolkit product.

- [OCLC Update](#) (Report distributed for Jay Weitz):

16. Other

- Website Steering Committee (Marcia Barrett):
The launch of the new website is getting close. The Board has appointed a new web developer who will also act as the chair of the Website Steering Committee. This person will handle the migration. The new logo which was supposed to be unveiled with the new website will be used in OLAC's social media and the Newsletter.
- Conference Planning update (Stacie Traill):
Thank you to everyone who completed the survey on workshop topics for the OLAC biennial conference. We have run into some difficulties for the 2016 conference. Once involved with the planning, it became clear to the planning committee that the model and structure may not be financially sustainable for the organization. The recent conferences in Kansas City and Albuquerque had mixed results. Albuquerque resulted in a small profit but Kansas City a deficit due to complications with the hotel. Looking beyond this into the income and expenses for the biennial conferences, there is a trend that conferences are becoming more expensive. The planning committee began working with two members on the possibility of a conference in the DC area. The committee

received only one bid from a hotel that was a budget buster. The committee searched for better options with none forthcoming. After careful discussion and thought, the planning committee decided not to enter into this contract and began exploring other options. At this point, the Board has not found any viable options and doesn't think we can hold a 2016 conference in the fall. This is disappointing news but also an opportunity to create a more sustainable model. We hope to have the conference in fall or spring 2017. To this end, we are investigating non-profit spaces such as universities and colleges. Other options are being considered and input from the membership is encouraged and will be sought out. Some issues to consider are cutting back on refreshments, slightly raising conference fees, and creating a sustainable model for supporting presenters. One idea is to have the conference before or after ALA. However, because ALA holds its conferences in big cities, the cost could be prohibitive. There is another choice of selecting a nearby smaller town. There is the possibility of having a joint conference with MOUG. If you have ideas, please email Stacie directly.

17. Discussion

- RDA/ONIX Framework (Annie Glerum)
The [RDA/ONIX Framework](#) dates back to 2006 when it began as a framework for controlled vocabulary for AACR3. The RDA/ONIX Framework provides vocabulary sets of defined attributes of resource content, carriers, and specified primary values for a subset of the defined attributes. The RDA/ONIX framework is used to derive content, carrier, and media terms for RDA. The idea behind this is to provide a shared standard vocabulary between catalogers, vendors, and others who rely on content and carrier terms for description.

The current committee membership, terms of reference, and new tasks can be linked to from the [RDA Steering Committee](#). This is a work in progress that will eventually line up with RDA's view. The positive for audio-visual catalogers is that vocabularies can have subcategories or subtypes. Though at times these subtypes might not be obvious, brand names such as Playaway can be used as a subcategory which is convenient.

[See report for additional information.](#)

From the Outreach Coordinator

Jeremy Myntti



We have started a project to create a page about OLAC on Wikipedia.

Thank you to Violet Fox (Metadata Librarian at the College of Saint Benedict, Saint John's University) and John Lavalie (Cataloging and Metadata Specialist at Des Plaines Public Library) for volunteering to help with this project. We could still use more people contributing to the project, so feel free to volunteer if you can. You don't need experience in working with Wikipedia to help find more content that could be added to the page. If you are interested in helping out with this project, please [contact me](#) to let us know that you would be willing to participate.

Did you attend ALA Midwinter in Boston and take any photos of any of the OLAC events that you are willing to share? If so, please let me know and we can add these to [OLAC's Flickr page](#).

A big thanks goes to Amy Pennington who has been promoting OLAC and our resources when guest teaching in the University of Missouri School for Information Science and Learning Technologies' Cataloging and Classification course. She has been using OLAC resources in this class for the past few years while she helps prepare the future generation of catalogers.

We would love to know if you have promoted OLAC or used any OLAC resources in any presentations or classwork like Amy has that we can feature in the quarterly newsletter. To submit any outreach activities or if you have an idea for a way to help us with outreach for OLAC, please [contact Jeremy Myntti](#). We are also seeking to find more content to share in the Members on the Move column, so send in information of any achievements that you or any fellow OLAC members have accomplished.

OLAC 2016

Meet the Candidates

It's OLAC election season! This year we will be electing a new Vice President/President-Elect and a new Secretary. Both terms will begin at the end of the 2016 ALA Annual Conference.

The Vice President/President-Elect will serve for one year, and then go on to be President for a year, then serve as Immediate Past-President in the third year. Here are the duties of these positions, from Article V of the OLAC Handbook:

- The President, in addition to regular duties, acts as presiding officer of the association, acts as representative of the organization with the Library of Congress, bibliographic utilities, and other organizations.
- The Vice President/President-elect substitutes as the presiding officer when necessary and acts as the program coordinator.
- The Immediate Past President attends the Executive Board meetings to counsel and inform; chairs the Nancy B. Olson Awards Committee.

The Secretary serves a two-year term. Here are the Secretary's duties from Article V of the OLAC Handbook:

- The Secretary performs the normal duties of the office and prepares all corporate reports required by the state in which incorporated.

All current personal members of OLAC are eligible to vote. An electronic ballot shall be delivered to the last email address you provided to the OLAC Treasurer. The election will be held in April 2016. If you require a paper ballot for any reason, you must contact the Elections Committee Chair by April 1, 2016, to make the request. Paper ballots must be postmarked no later than April 30, 2016. The 2016 OLAC Elections Committee Chair is:

[Liz Miller](#)

Head of Cataloging

New Mexico State University

We have one candidate for Vice President/President-Elect: Jeremy Myntti; and two candidates for Secretary: Valarie Adams and Jeannette Ho. Each ballot will offer a write-in option.

Here are the candidates' statements:

Candidate for OLAC Vice President / President Elect

Jeremy Myntti

Interim Head, Digital Library Services
University of Utah

I have been working at the University of Utah's Marriott Library since 2012 as the Head of Cataloging and Metadata Services and most recently as Interim Head of Digital Library Services. In these positions, I have had responsibility for supervising all of the catalogers in our library as well as acting as the Systems Librarian for all cataloging and acquisitions modules within the ILS shared by the four University of Utah Libraries. Prior to my work at the UofU, I worked for Backstage Library Works for nine years helping hundreds of libraries complete many types of projects related to cataloging, authority control, database maintenance, and digital projects. My library career began while working as a student in the small library of the Utah Valley University's Music Department. My major task in this position was creating a basic cataloging system for organizing the department's sheet music, cassette tape, and CD collections, and then entering all of the records for these items into the system.

I have been serving on the OLAC Executive Board as the Outreach and Advocacy Coordinator since 2013. In this position, I have been able to implement social media for the organization via Facebook, Twitter, and Flickr. I have also been serving on the OLAC Website Steering Committee, helping to migrate to a new site that is forthcoming. In addition to my service for OLAC, I am also involved with ALCTS as a member of the ALCTS Monographs Editorial Board and as a marketing co-coordinator for the ALCTS Continuing Education Committee.

Over the past several years, I have learned a lot from many OLAC members as well as OLAC resources. By serving as Vice President/President Elect of OLAC, I would have the opportunity to give back even more to the organization. Cataloging is evolving with new technologies and standards that are constantly developed and implemented, and I look forward to the opportunities available to help move the cataloging world towards the future.

Candidates for OLAC Secretary

Valarie Prescott Adams

Cataloging Librarian, Special Collections/Collection Services Department
The University of Tennessee at Chattanooga

Valarie Prescott Adams is the Cataloging Librarian at the University of Tennessee at Chattanooga. She works out of the Library's Special Collections Department, and is responsible for creating and editing metadata in all formats for all of the UTC Library's physical and online collections. Valarie holds a M.S.L.S. from the University of Tennessee – Knoxville. She attended her first OLAC Conference in 2008 and has attended all of the conferences since then, as well as presenting three poster sessions. She has also been a member of the OLAC Elections Committee since 2012 until 2015.

Valarie's recent organizational secretarial experience has been with the Chattanooga Area Library Association for two years, then moving into responsibilities as Vice-President/Programs Chair and finally as President of CALA. She is currently serving a two-year term as Secretary of the Master Gardeners of Hamilton County (Tennessee), a position which also prepares reports for the State of Tennessee. Valarie has recently served as Conference Co-Chair of the Tennessee Library Association which is just one of many Board positions that she has held over several years. She considers OLAC her library organization of first choice and is eager to give back to the group that has given her so much.

Jeannette Ho

Cataloging Librarian

Texas A&M University Libraries

I have been in the cataloging profession for sixteen years. I spent the first ten years of my career as the Special Formats Cataloging Librarian at Texas A&M University Libraries where I cataloged various types of media, including video recordings, sound recordings, tangible and online electronic resources, and curriculum kits. I have also served in supervisory positions for the Cataloging staff and faculty at Texas A&M University Libraries from 2009 to January 2016.

I have served on OLAC CAPC from 2005 to 2009 and participated in various OLAC task forces over the last fourteen years. I recently chaired the task force that created the current best practices guide for cataloging streaming media according to RDA, and also chaired the one that created the original guide on cataloging this format according to AACR2. In addition, I have served on several committees within the Association for Library Collections and Technical Services (ALCTS) division of the American Library Association (ALA), and chaired the Cataloging and Metadata Management (CaMMS) Policy and Planning Committee. I have recently concluded a term as an elected CaMMS member-at-large. I have also published articles in peer-reviewed journals on issues relating to cataloging videos and the enhancement of catalog records.

OLAC fills an important need in supporting and advocating for nonprint catalogers. Throughout my career, I have found OLAC to be an extremely valuable resource in providing guidance in cataloging various formats, as well as opportunities to participate in providing input on RDA, as it was being developed, and helping to shape best practices. If elected Secretary, I would like to give back to the organization by serving in this role. I have served as Secretary of the Faculty Executive Committee at Texas A&M University Libraries, as well as Secretary of the ALA New Members Round Table earlier in my career. I believe that my experiences would benefit me in this position and appreciate the opportunity to run for Secretary of OLAC.

Conference Reports from the 2016 Midwinter Conference

Jan Mayo, Column Editor

A/V Glossary Report

submitted by Heidi Frank

I don't have anything new to report about the AV Glossary, but now that some things have fallen off my plate, I do hope to make progress this year and to find someone who can help with the technical aspects. I did have a lead for someone who was interested, so will follow up on that and/or look for someone else. We could use a volunteer who has programming skills, specifically Javascript, PHP, and/or MySQL.

Committee on Cataloging: Description and Access (CC:DA) Report

submitted by Kelley McGrath

At the fall 2015 JSC meeting, the JSC was renamed the [RDA Steering Committee \(RSC\)](#) to reflect its new international scope. The RSC is transitioning to a new governance model that will have greater international and wider community representation. Rather than having representatives from national libraries and library associations, the new RSC will have regional representatives, as well as functional members, such as the examples editor. There will be six regions and there will be only one representative from the North American region, i.e., the United States and Canada. In conjunction with this organizational change, the RSC's role will also be modified so that much of the practical work is carried out by working groups charged by the RSC. This transition is being made gradually and is expected to be complete in 2019.

At its fall meeting, the JSC discussed a variety of proposals and discussion papers. A [full list of outcomes](#) is available as well as the [report of Kathy Glennan](#), ALA's representative to the JSC/RSC.

OLAC submitted one proposal dealing with characteristics of optical discs. We initially proposed elements for data storage format (CD vs. DVD as a physical disc) and recording method (stamped vs. burned, e.g. DVD-R, DVD+R). The data storage element proposal was rejected outright. The JSC's position is that this information should be included in the encoding formats list in chapter 3. That list has multiple problems and the JSC would like to rework it. However, OLAC does not have the right expertise to take this on and the JSC has taken no action to actually pursue updating 3.19.3. This is frustrating since OLAC initially pointed out the lack of a way to identify a disc as a CD or DVD in our comments on the RDA drafts and there is still no way to do this in RDA. However, there does not appear to be any

further viable action that can be taken by OLAC as the JSC has rejected our approach and has not followed up on implementing their preferred approach.

We were told that recording method should be submitted as a subelement of 3.9 production method rather than as its own element. However, the JSC rejected this also and instead will add terms for our proposed “burned” and “stamped” to the general list at 3.9.1.3. Examples of other things in this list are blueprint, engraving, photocopy and woodcut, all of which are eye-readable and intuitive production methods. In further unhelpful developments, the JSC also decided to generalize the definitions because things other than optical discs can be burned or stamped. The UK submitted [two](#) follow-up [documents](#). As part of this update, they changed the form of some of the terms in the list at 3.9 so the terms that will probably be added to RDA will be “burning” (a production method consisting of the application of heat to mark the surface of a material) and “stamping” (a production method consisting of the application of pressure to make an impression on the surface of a material). I am not sure how a cataloger is going to recognize these or how this is going to help any user.

A number of other proposals, including some music-related ones, were accepted. In other decisions, the JSC put a moratorium on adding new relationship designators other than those already proposed during 2015 until the JSC Relationship Designators Working Group has finished its tasks of preparing a general paper on designators and a set of guidelines for proposing new designators. Proposals already in progress will be still be reviewed.

Also of potential interest is the [discussion paper put forward by the working group on aggregates](#). The group investigated [aggregate modeling from the perspective of FRBRoo](#) (object-oriented FRBR). FRBRoo is a more detailed, event-based model in which every publication is an aggregate. In her report, Kathy Glennan notes that in FRBRoo “manifestations include layout and typography decisions made by the publisher, along with the work of the author. Of course, other parts of the manifestation may have separate creators, such as the introduction or the illustrations.” So the layout decisions are considered a work created by the publisher, which are aggregated with the text in the manifestation. Kathy also points out that “when the model is applied at the most detailed level, the contributor role disappears: a preface has an author; an illustration included in a book has its own artist, etc.” It has been suggested that this could alleviate the problems caused by RDA’s association of many moving image-related roles, such as actors or costume designers, with the expression. However, it is not clear to me that it does.

Joint MLA/OLAC Task Force on Playaways

submitted by Robert Freeborn

Membership

Robert Freeborn - Penn State University (MLA) [Chair]

Rosemary Groenwald - Mt. Prospect Public Library (OLAC)

Jennifer Olson - Hartt School (MLA)

Julie Moore - Fresno State University (OLAC)

Jay Weitz – OCLC

Charge

This task force will update the current AACR2 Playaway guide for use with RDA. The updated guide should also consider adding guidelines for any new Playaway formats (e.g., video)

Sponsors

Mary Huismann - University of Minnesota (OLAC)

Tracey Snyder – Cornell University (MLA)

Status

The Task Force has broken the AACR2 guide down into its component sections, and members have begun to rewrite each of these sections to reflect the new RDA rules. In addition, the Task Force has identified new and revised Playaway products for future additions/revisions to the guide.

Timeline

Hope to have a major portion of the guide done by 2016 ALA Annual, with the entire guide finished and ready to receive comments from the MLA and OLAC communities by 2017 ALA Midwinter.

Joint OLAC/SAC Task Force on Preferred Titles

submitted by Greta de Groat

The Joint OLAC/SAC Task Force on Preferred Titles for Games was formed in March to address several issues regarding practices for preferred titles and authorized access points for games that came up during the work on the Video Game Best Practices. After receiving feedback after Annual, we revised our report and submitted it to LC in August, and we are now awaiting LC's response.

Library of Congress Report

submitted by Janis L. Young

Personnel Changes. The following personnel changes have occurred since the Annual Conference in San Francisco.

- Dr. James H. Billington, the Librarian of Congress, retired on September 30, 2015, after 42 years of federal service including 28 years with the Library. Dr. Billington was the 13th Librarian of Congress. David S. Mao, Deputy Librarian of Congress, was named acting Librarian of Congress. Robert R. Newlen is the Library's Chief of Staff.
- Ana Cristán, Cooperative Cataloging Program Specialist, retired from PSD on September 3, 2015 after 35 years of federal service (30 years at the Library of Congress). Notable contributions from Ana's time in PSD include development work on the Virtual International Authority File, Latin American outreach via cataloging training and documentation, RDA development and training, and automated enhancements to the LC/NACO authority file.

Term of the Librarian of Congress. S.2162, the Librarian of Congress Succession Modernization Act of 2015 was passed by Congress on October 26, 2015 and signed by President Obama on November 5, 2015. The law limits the term of the Librarian of Congress to ten years. The Librarian may be reappointed.

ABA Vacancy Announcements. The ABA Directorate has permission to fill approximately 30 vacancies from open postings—not limited to internal applicants—in 2015-16. Every division has permission to fill one or more vacancies, and the vacancies will be announced on the USAJOBS web site and the Library's web site as the application periods open. Most of the positions to be filled are for professional librarians and may carry specific language requirements.

The Policy and Standards Division will be posting for two policy specialists and one assistant editor. The pool for the policy specialists is limited to existing Library Services staff, while the assistant editor is an open posting.

BIBFRAME. This initiative is an investigation of the emerging Linked Data environment for sharing of bibliographic descriptions that currently use the MARC Format. Documentation of the project is available from the [BIBFRAME web site](#). In fiscal 15, the Library of Congress continued development of the Bibliographic Framework model and vocabulary to replace MARC 21 as a cataloging metadata standard in order to reap the benefits of newer technology, particularly data linking. The Library built on the work and tools developed in fiscal 2014: a stable version of the vocabulary, data entry editing tool, and transformation tool that converts MARC records to BIBFRAME descriptions. These were updated and combined with other new components to support a BIBFRAME Pilot that enables input of native BIBFRAME descriptions. The Pilot was implemented by ABA at the end of September 2015. The following tools and components contribute to the Pilot and to the encouragement of experimentation with

BIBFRAME by the community, as generally they are made available for download on the software sharing site, GitHub:

BIBFRAME Infrastructure. In fiscal 2015 NDMSO began the process of revamping servers and systems to handle new traffic loads anticipated for linked data resolution, label lookup, and other services related to the BIBFRAME project and the linked data service, id.loc.gov. An upgrade to the MarkLogic datastore server to 8.0 was purchased, to allow for security updates and the inclusion of native handling of RDF triples in the database, as well as to allow for the possibility of using Javascript for various components of the system, not only xQuery. This effort is continuing in fiscal 2016 as we install the upgrade and begin to take advantage of its new features. The currently installed version of MarkLogic (5) was used to support the BIBFRAME Pilot.

BIBFRAME Editor (BFE). Development of the BIBFRAME Editor continued in 2015, and was integrated with profiles provided by the Profile Editor. Lookups were also developed for resources within id.loc.gov that were needed by the Editor. The enhanced BIBFRAME Editor was successfully introduced in the BIBFRAME Pilot to develop descriptions of library resources using the BIBFRAME model and vocabulary. [Version 0.2 of the editor](#) was prepared for release.

BIBFRAME Profile Editor. A [BIBFRAME Profile Editor](#), which was needed to make the BFE flexible for use with different forms of material, was delivered by a contractor in February 2015. It enabled creation and editing of BIBFRAME profiles for use with the BFE in support of the BIBFRAME Pilot. Version 1.1.1 was released to the public in July 2015.

BIBFRAME Discovery Interface. Influx Library Systems was contracted by NDMSO to build a proof-of-concept implementation of an [open-source based discovery interface to the BIBFRAME vocabulary](#). MARC records were converted to BIBFRAME using the existing marc2bibframe conversion application. A docker container with an Elasticsearch search engine, Blazegraph SPARQL endpoint, FEDORA Commons datastore with a front end UI, developed using Python 3.x. Version 0.1, was released in August 2015 for experimentation with BIBFRAME by the community.

BIBFRAME output from Metaproxy. A contract was let in fiscal 2014 to add the MARC transformation software to Metaproxy, a tool that is used by LC to enable its Integrated Library System to correctly process Z39.50 and SRU protocol queries and return records in MARCXML, MODS, and other data exchange formats. BIBFRAME was added to the possible output formats in 2014, but at the end of fiscal 2015 it was awaiting installation at the Library.

Metaproxy Enhancement. In fiscal 2015 LC contracted with IndexData to augment Metaproxy to process SRU searches against a BIBFRAME-based database and retrieve BIBFRAME data (in addition to the MARC-based database it currently expects). The project illustrated that Metaproxy could accommodate the BIBFRAME-based data model. A follow-on contract then enhanced the product to a more detailed level to enable LC to determine issues and enhancements needed for the SRU standard search protocol and its query language Contextual Query Language (CQL). These standards are maintained by the Library of Congress and used extensively by LC and the library community for information retrieval.

AV in BIBFRAME. The Library also commissioned a study as a follow-up to the [study on modeling audiovisual material in BIBFRAME](#) that was published in 2014. The new study investigates the levels of technical metadata needed in the bibliographic description in order to use the item, versus linking to more detailed technical details needed for preservation of an item. It is completed and near publication.

Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT).

Genre/Form Terms Manual. In early January 2016, PSD published a draft *Genre/Form Terms Manual* that provides guidelines and instructions for making proposals and applying genre/form terms in bibliographic records and in authority records for works. The manual replaces the informal and occasionally ad-hoc guidelines that had been in place since the project to develop LCGFT began in 2007.

The [draft instruction sheets may be found in PDF form](#) and will appear in Cataloger's Desktop in late 2016. Comments on the drafts may be directed to [Janis L. Young](#) through May 31, 2016.

Definition of Genre/Form. PSD has revised LCGFT's definition of genre/form in response to a recommendation from the ALA/ALCTS/CaMMS Subject Analysis Committee's Working Group on the Definition and Scope of Genre/Form for LCGFT. Among other changes, the revision does not make a distinction between genre and form, but instead treats them as a single unified concept. PSD believes that the new definition balances the desire of the library community to include a broad range of terms in the vocabulary with the need to provide clear guidance to those using and maintaining it. The revised definition is included in the draft *Genre/Form Terms Manual* and will appear in the introduction to the new edition of LCGFT, which will be published in early 2016.

Scope Notes. In November 2015, PSD determined that the style of scope notes in LCGFT should be simplified. Instead of beginning with "This heading is used as a genre/form heading for...", scope notes no longer have an introductory phrase. The project to revise the existing scope notes was completed in December 2015.

Geographic Subdivision. To promote consistency in LCGFT, PSD has undertaken a project to revise all genre/form terms currently marked (*Not Subd Geog*) to *No decision*. This action will have no practical effect on assignment of terms, since neither terms marked (*Not Subd Geog*) nor those marked *No decision* may be geographically subdivided. The project affects approximately 370 of the over 1,800 terms in LCGFT and will be completed by early 2016.

Literature Project. The literature genre/form project is a collaboration undertaken by PSD and the ALA/ALCTS Subject Analysis Committee's Subcommittee on Genre/Form Implementation, which formed the Working Group on LCGFT Literature Terms.

In September 2015, PSD approved 150 literature genre/form terms that were proposed by the Working Group, thus completing the literature genre/form project. The first group of approximately 230 proposals had been approved in May 2015, but review of the remaining proposals was postponed due to staffing and workload levels in PSD.

Religion Project. The religion genre/form project was a collaboration between PSD and the American Theological Library Association. In September 2015, PSD approved 45 proposals for religion genre/form terms.

Proposals for New and Revised Genre/Form Terms. PSD is not currently accepting proposals for new and revised terms in the areas of music, literature, religion, or the “general” terms (e.g., handbooks, dictionaries), but continues to accept proposals in the areas of moving images, non-musical recorded sound, cartography, and law.

LC implementation. The Library of Congress’ Acquisitions and Bibliographic Access Directorate, which catalogs most of the textual works acquired for the Library’s general collections, has not yet decided when it will implement the “general,” religion, and literature genre/form terms.

Library of Congress Demographic Group Terms. *Library of Congress Demographic Group Terms* (LCDGT) is intended to describe the creators of, and contributors to, resources, and also the intended audience of resources. Terms may be assigned in bibliographic records and in authority records for works.

Pilot Phase 2. Phase 2 of the pilot was completed in December 2015, with the approval of over 400 proposals for new terms and also some revisions to previously approved terms. There are now approximately 800 terms in the vocabulary. The [approved terms are based on guiding principles](#) that specialists in LC’s Policy and Standards Division (PSD) have developed, and are that available on LC’s website.

Demonyms for Local Places. PSD has decided in principle that demonyms for the residents of local places (e.g., counties, cities, city sections) may be included in LCDGT, but the appropriate level of disambiguation among demonyms that are, or that may be, used to refer to people from unrelated places must be determined. The form of qualifier must also be decided. In November 2015 PSD published a paper entitled [Demonyms for Local Places in LC Demographic Group Terms: Analysis of the Issues](#), in which several options for disambiguation are discussed. Feedback and suggestions on the issues presented in the paper may be directed to [Janis L. Young](#) by January 30, 2016.

Demographic Group Terms Manual. In January 2016, PSD published the draft [Demographic Group Terms Manual](#), which is based chiefly on the guiding principles for LCDGT (see above). The manual provides guidelines and instructions for making proposals and applying demographic group terms in bibliographic records and in authority records for works. The draft instruction sheets may be accessed in PDF form and will appear in Cataloger’s Desktop in late 2016. Comments on the drafts may be directed to [Janis L. Young](#) through May 31, 2016.

Pilot Phase 3. Policy specialists in PSD created all of the proposals that were approved in phases 1 and 2 of LCDGT development. The proposals that they included were chiefly intended test theories on policies, and the approved terms highlight specific areas of concern (e.g., conflict situations; hierarchies), provide useful examples, and serve as the basis for future development. PSD believes that the vocabulary is now robust enough to support limited use, and that it is time to test the policies in a production environment. PSD will therefore accept proposals for terms that are needed *in new*

cataloging only. Due to PSD staffing and workload considerations, proposals that appear to be made as part of retrospective projects, or projects to establish terms that are not needed for current cataloging, will not be considered.

All proposals should follow the guidelines on form of authorized term, references, scope notes, research, etc., presented in the draft *Demographic Group Terms Manual*.

SACO members should use the Proposal System when making proposals and [send an email](#) to inform Coop staff that the proposals are ready, according to the normal procedure.

To encourage broad implementation of LCDGT, PSD has also [created a survey](#) to enable catalogers who do not work at LC or in a SACO institution to contribute proposals. The survey requests the same information that the Proposal System does, but in a simplified format. PSD staff will make the formal proposals, which will be vetted during the standard editorial process. The survey will be available for the duration of Phase 3 of the pilot, which is scheduled to end on May 31, 2016.

LC Implementation. The Library of Congress' Acquisitions and Bibliographic Access Directorate, which catalogs most of the textual works acquired for the Library's general collections, has not yet decided when it will implement the demographic group terms.

ALA Presentations on LCDGT. Janis L. Young, a senior cataloging policy specialist in PSD, will be making a presentation entitled *By Who and For Whom? LC Demographic Group Terms* at the ALA Annual Conference. She will discuss the purpose and structure of LCDGT, its current status, and plans for further development. She will also relate some anecdotes about interesting problems that have arisen while developing the vocabulary, and briefly present the general principles for assignment of the terms. The presentation will occur during the first hour of the Subject Analysis Committee's meeting on Monday, January 11, from 1-2 p.m. in the Seaport Hotel, Seaport Ballroom A&B and is open to all ALA attendees.

Young will also discuss issues related to the inclusion of demonyms for local places (e.g., Pittsburghers, Muscovites, Bostonians) in Library of Congress Demographic Group Terms at the PCC-At-Large meeting on Sunday beginning at approximately 11:15 a.m. The meeting will be held in the Boston Convention Center, Room 156C.

Questions and comments about LCDGT may be directed to [Janis L. Young](#).

MARC Advisory Committee (MAC) Report

submitted by Cate Gerhart

This report provides information of interest to the OLAC constituency from the January 2016 MARC Advisory Committee (MAC) meetings in Boston, Massachusetts. If you would like to see the complete list of topics discussed, you can find them [online](#). The agenda for this meeting was very long with two Proposals and 16 Discussion Papers. I covered as much as possible below but with so many discussion papers some editing was needed to make this report manageable. Do use the link above if you would like more information than what is provided below.

Proposal No. 2016-01: Coding 007 Field Positions for Digital Reproductions of Sound Recordings in the MARC 21 Bibliographic Format

This proposal passed unanimously. Here are the changes that were approved to the 007 for sound recordings.

007/00 – s – Sound recording – Rewrite definition slightly so it is broader and more inclusive of digital recordings.

007/01 – Specific material designation: Add code r for Remote and code s for Standalone device; clarify use of code “b” so it is clear it can be used for USB drives, etc.

007/03 – Speed: Clarify that speed is only intended to be used for recordings rendered on a mechanical device and add “n” for “not applicable.”

007/10 – Kind of material: Clarify that kind of material is only intended to be used for recordings rendered on a mechanical device and add “n” for “not applicable.”

Proposal No. 2016-02: Defining Subfield \$r and Subfield \$t, and Redefining Subfield \$e in Field 382 of the MARC 21 Bibliographic Format

This proposal passed unanimously. It adds two new subfields to the 382, \$r for total number of individuals performing alongside ensembles, and \$t, total number of ensembles.

Discussion Paper No. 2016-DP01: Defining Subfields \$3 and \$5 in Field 382

This discussion paper will come back as a proposal at ALA Annual. The ability to indicate that a particular instrumentation applies to only a particular institution is needed for this field. It is not uncommon that libraries get gift copies or returned copies where a patron has done a transcription for a different instrument, usually in a different key. The \$3 and \$5 will allow institutions with this kind of additional part to put it in the 382 field with appropriate tagging.

Discussion Paper No. 2016-DP02: Clarifying Code Values in Field 008/20 (Format of Music)

There is still much confusion about how to use the codes in the Format of Music fixed field. This discussion paper and the coming proposal at ALA Annual will bring the codes more in alignment with RDA and will clarify their usage so it is clearer what to use when. The main codes that need clarification are h, i, j, and z. This discussion paper will come back as a proposal at ALA Annual.

Discussion Paper No. 2016-DP03: Recording Distributor Number for Music and Moving Image Materials

This paper looked at adding a first indicator “6” to the 028 for distributor and clarifying the use of the 037 so that there would be a clear distinction between the use of the 028 and 037. This discussion paper will come back as a proposal at ALA Annual.

Discussion Paper No. 2016-DP04: Extending the Use of Subfield \$0 to Encompass Linking Fields

This paper requests that the \$0 be added to the 7xx linking fields so that links can be made from \$i's to their registry equivalents. This discussion paper will come back as a proposal at ALA Annual.

Discussion Paper No. 2015-DP05: Expanding the Definition of Subfield \$w to Encompass Standard Numbers

Currently, the \$w is used to record system control numbers like OCLC numbers and DLC numbers. This paper would expand the use of this subfield so that, in addition to a system number, a URI could be recorded to link to the bibliographic record. This discussion paper will come back as a proposal at ALA Annual.

Discussion Paper No. 2016-DP06: Define Subfield \$2 and Subfield \$0 in Field 753

This was the only discussion paper that was allowed to be voted on and approved without the normal proposal process being adhered to. It passed unanimously. This paper/proposal adds the \$2 and \$0 to the 753 allowing the new thesaurus being developed by the GAMECIP (Game Metadata and Citation Project) to be used and identified. The make and model of machine is particularly important to the gaming community so this field will be used heavily for the cataloging of computer and video games.

Discussion Paper No. 2016-DP07: Broaden Usage of Field 257 to Include Autonomous Regions

OLAC was the author of this paper, requesting a slightly broader definition of the 257 field. This broadening will enable catalogers to enter the names of autonomous regions such as Hong Kong or Palestine into this field. These regions have a strong motion picture identity which we would like to be able to bring this out in our records. This discussion paper will come back as a proposal at ALA Annual.

Discussion Paper No. 2016-DP08: Remove Restriction on the Use of Dates in 046 \$k

OLAC authored this paper as well. This paper resulted in a lot of discussion ranging from comments on why this restriction is there to begin with, to indications that catalogers are reading the restriction incorrectly and there is not a problem with the 046 as written. In the end though, there was agreement that if catalogers are confused about whether they can use the 046 to always enter the date of release for a film, regardless of where else that date might appear in the record, then it should be clarified. This discussion paper will come back as a proposal at ALA Annual.

Discussion Paper No. 2016-DP09: Coding Named Events in the MARC 21 Authority and Bibliographic Formats

This paper looks at the history of using the 611 for meeting/conference information, as defined in MARC, as well as other events such as battles, earthquakes, riots, etc. that are not in the definition. Options would be to broaden the use of the 611 to “officially” encompass all kinds of events or to define a new field for events outside the meeting/conference scope, possibly the 647. This discussion paper will come back as a proposal at ALA Annual.

Discussion Paper No. 2016-DP10: Defining Field 347 (Digital File Characteristics) in the MARC 21 Holdings

It is not uncommon for vendors of electronic information (e-books, streaming audio and video, etc.) to encode the data in different ways, for instance HTML or PDF. It makes sense to store this data in the holdings format so that a provider neutral record can still be used. This paper looks at how adding the 347 to the holdings format would work for these instances in our catalogs. This discussion paper will come back as a proposal at ALA Annual.

Discussion Paper Nos. 2016-DP11 – DP16.

These 5 discussion papers were all submitted by the German National Library. While there might be some slight effect on catalogers in the U.S., in general they solve problems that the German libraries are having and will have only marginal use here. If any of these come back as proposals, I will provide more detail about them at that time.

MOUG Liaison Report

submitted by Karen Peters

NACO-Music Project Moved from MOUG to MLA

The NACO-Music Project (NMP) has made an administrative move from MOUG to the Music Library Association, where it now falls under the oversight of the Cataloging and Metadata Committee (MLA-CMC) alongside the other PCC music funnels (BIBCO and SACO).

MOUG Conference

MOUG's 2016 annual meeting will be held Tuesday, March 1-Wednesday, March 2, 2016 in Cincinnati at the Hilton Netherland Plaza Downtown. The [schedule is available](#) at the Music Library Association website. For the 2016 conference, three Ralph Papakhian Travel Grants have been awarded.

New Officers

At the end of the 2016 Conference, Casey Mullin will assume the position of MOUG Chair, and Tomoko Shibuya that of MOUG Treasurer.

NACO-AV Coordinator's Report

submitted by Peter H. Lisius

1.) Contributions to the funnel

- a. Independent contributors (institutional):
 - i. Carnegie Library (Personal and corporate names)
- b. Kent State University (Personal and corporate names)
 - i. University of Alabama (Personal names); **independence granted, October 7, 2015**
 - ii. University of Akron (Personal and corporate names); **independence granted in corporate names, October 13, 2015**
- c. Independence-seeking mode
 - i. University of Alabama (Corporate names)
- d. Possible/probable future contributors to the NACO-AV project:
 - i. University of North Carolina—Wilmington
 - ii. University of South Carolina—Columbia
 - iii. University of Nevada—Las Vegas
 - iv. Access Educational Media
 - v. Rock & Roll Hall of Fame Library
 - vi. University of Missouri—Kansas City
- e. Stats from PCC site: **Will provide at ALA Annual**
- f. Current reviewers: Chuck Herrold (Carnegie Library); Peter Lisius (Kent State)

2.) NACO-AV workshop, Kansas City, MO (October 2014)

3.) Accomplishments (July-December 2015)

- a. Declared University of Alabama independent in contributing personal names
- b. Declared University of Akron independent in contributing corporate names
- c. Internally documented the method by which an individual is granted independence in the NACO-AV funnel
- d. Internally documented the method by which an individual/institution becomes a member of NACO-AV

4.) Goals

- a. Immediate
 - i. Officially document the method by which an individual gets independence in the NACO-AV funnel (to be placed on NACO-AV pages on OLAC website)
 - ii. Officially document how one becomes member of the NACO-AV (currently addressed in the FAQ section; I think this would be better on its own).
- b. Long term
 - i. Increase number of reviewers
 - ii. Find a new assistant coordinator
 - iii. Create a “best practices” document for creating NACO-AV NARs; possibly follow the work of the NMP as a model.

- iv. Update/reevaluate "[AV Authority Tools](#)" page on the OLAC website; contact individuals who originally compiled the document.
- v. Official incorporate/offer training in the contribution of motion picture/television program/radio program title NARs (130s) into the work of the funnel.

OLAC Membership Meeting Discussion: RDA-ONIX Framework

submitted by Annie Glerum

RDA/ONIX Framework (ROF)

The [RDA/ONIX Framework for Resource Categorization](#) provides sets of defined attributes of resource content and resource carriers and specified primary values for a subset of the defined attributes.

ROF is used to derive content and carrier categories specified in RDA. Attributes and values are represented in the RDA Registry as the RDA/ONIX Framework element set and RDA/ONIX value vocabularies. ROF is aligned with RDA, as stated in RDA 0.3.2, and is the basis of the RDA value vocabularies for Carrier Type, Content Type, and Media Type.

—Paraphrased from [About the RDA Registry and vocabularies](#)

RDA/ONIX Framework Working Group

[RDA Steering Committee Working Groups](#)

6JSC/ROFWG/3 [Guidelines for Proposing New Carrier and Content Categories and Terms in RDA](#)

6JSC/ROFWG/3-Categories [RDA Content and Carrier Categories](#)

[Interactive ROF visualization](#)

RDA/ONIX Framework element set and RDA/ONIX value vocabularies

RDA/ONIX and the Description of Non-print Resources

Sub-types of a base category can be proposed. For example, in the Intermediation Tool category, "Playaway" can be a sub-value of "audio player."

However, Housing Format for Playaway audio chip is currently "not applicable."

Other observations: "three-dimensional moving image" is used for those perceived as 3-D as well as for 3-D graphics based on x, y, and z planes; "three dimensional form" and "three-dimensional tactile form" are not mutually exclusive.

For proposals or other concerns, please send your comments to [Annie Glerum](#).

Semi-annual report of The Subcommittee on Maintenance for CAPC Resources (SMaCR)

Submitted by Richard N. Leigh

The Subcommittee on Maintenance for CAPC Resources (a.k.a. SMaCR) “is [charged](#) with identifying those CAPC resources that need ongoing maintenance, determining how often and who will update them, and examining the structure of the CAPC web pages and making recommendations for reorganization (in collaboration with Teresa Keenan, OLAC Webmistress).”

SMaCR submits a report “whenever CAPC meets.” [SMaCR’s General Operating Procedures](#) specify that this report should contain: “What resources are tagged for review; What resources have been reviewed; What resources have been updated; & What resources have been archived”.

In the first half of 2016 ...

24 resources are currently tagged for review.

0 resources completed their reviews.

0 resources were substantially updated.

0 resources were archived.

0 task forces were added to the list of Active Task Forces & Subcommittees.

0 task forces were moved to the list of Past Task Forces & Subcommittees (from the Active list).

1 addition was made to the Cataloging Tools and Training Documents section.

0 additions were made to the Reports and Thought Papers section.

SMaCR keeps a spreadsheet with information about the content and organization of the CAPC section of the OLAC website. That spreadsheet has been updated to reflect the most recent round of changes to the CAPC website. Future lists of requested changes will be sent to OLAC Webmistress Teresa Keenan, with the Chair of CAPC being copied.

The first six months of 2016 look to be a busy time for SMaCR. SMaCR is in discussions with CAPC about how best to review RDA-related guides, as the content of those guides should ideally be analyzed after each RDA Toolkit update. Management of the reviews and upkeep of the website will be divided between all SMaCR members.

Please direct all questions about SMaCR to its chair, [Richard N. Leigh](#). Thank you for your time!

News and Announcements

T.J. Kao, Column Editor

MLA's RDA Best Practices & RDA Toolkit Update

The February 9, 2016 release of the RDA Toolkit included a variety of revisions to Music Library Association's Best Practices and the supplements. The summary of these changes is available at [MLA's Cataloging and Metadata blog](#) and the supplements are available at [MLA Cataloging and Metadata Committee's website](#).

2016 NETSL Conference Lightning Talks – Calls for Presenters

The New England Technical Services Librarian Executive Board is looking for presenters to give lightning talks on technical services related subjects. If you are interested, please submit a description of your talk to the NETSL Outreach Coordinator [William Shakalis](#) by March 11, 2016.

2016 OLC Technical Services Retreat – Save the Date

The 2016 Ohio Library Council Technical Service Retreat, themed "Link to the Future," will take place at the Nationwide Hotel and Conference Center, Lewis Center (Columbus) from March 31 to April 1. For more information on programs and registration, please visit the [OLC website](#).

AMIA's Digital Asset Symposium – Save the Date

Association of Moving Image Archivists' 2016 DAS, a symposium focusing on addressing the full lifecycle of media assets, will take place in New York City on May 4 and is open for [registration](#).

Members on the Move

Jeremy Myntti, Column Editor



T.J. Kao, new position at Claremont Colleges

Congratulations to T.J. Kao who started a new position as Original Cataloging and Metadata Team Leader/Asian Studies Librarian at Claremont Colleges Libraries in January 2016. T.J. was previously working at Yale University Library as the Chinese Technical Services Librarian.

CAPC Member Spotlights

In this issue's Members on the Move column, we are including a short sketch about some of the new CAPC members who started serving last year.

Rosemary Groenwald

Rosemary Groenwald has been Head of Technical Services at the Mount Prospect Public Library in Illinois for 15 years. She began working there 27 years ago as a para-professional patron assistant, then advanced to a Readers' Advisor, and then began to work as a reference librarian once she obtained her MLIS. She made the move to Technical Services 16 years ago. Her library is one of the top public libraries each year contributing series authority records for both youth nonfiction and adult and YA fiction which are added to the national authority file. She is a member of the Working Group of the ALA/ALCTS Subject Analysis Committee's Subcommittee on Genre/Form Implementation which has worked for over three years to develop the approximately 400 lcgft terms for literature which were finally approved by LC this year. Since she was appointed to CAPC, she has worked on the Task Force on Playaways, Video Game Genre Headings Task Force, and Task Force on Preferred Titles for Games

Julie Renee Moore

Julie Renee Moore is the Special Collections Catalog Librarian at the Henry Madden Library at California State University, Fresno. She has a BA in Anthropology and German from the Ball State University and an MA in Library and Information Science from the University of South Florida. Ms. Moore is an active member of OLAC, serving on OLAC CAPC and helping to write a number of best practices guides. She is also an active member in ALA (American Library Association) ALCTS, and CLA (California Library Association) TSIG. Julie was the recipient of OLAC's Nancy B. Olson Award and CLA's TSIG Award of

Achievement (2010). In her 26+ years of cataloging, her all-time favorite thing she's ever cataloged was a black bear named "Luego" in Alaska.

Lisa Romano

Lisa Romano is the Cataloging and Metadata Librarian at the University of Massachusetts Boston. After several years as a technical writer, Lisa decided to pursue her dream of becoming a librarian and earned her MLIS from Simmons College in August 2004. As the sole professional cataloger at her institution, she enjoys being the OLAC Newsletter Spotlight Editor and meeting other colleagues from across the country. Like many librarians, Lisa is interested in reading, writing, and travelling which she hopes to do more of in the future. She is looking forward to serving as a CAPC intern so she can learn more on how cataloging standards are developed.

Trina Soderquist

For the last nine years, Trina Soderquist has been the Catalog Librarian for Boston College's Educational Resource Center, a K-12 curriculum library that primarily supports the university's school of education. In this position, she has cataloged print monographs and serials, DVDs, anatomical models, maps, board games, and stuffed animals. She has served on the Cataloging of Children's Materials Committee (ALCTS) since July 2009 and was the committee's leader in planning its ALA Annual 2015 preconference workshop "Cataloging Special Formats for the Child in All of Us Using RDA and MARC21," featuring Julie Renee Moore and Jay Weitz. Trina is thrilled to have been appointed a member of CAPC and looks forward to welcoming everyone to Boston for Midwinter in January.

In the Spotlight with... Rosemary Groenwald

Lisa Romano, Column Editor

Our profile for this newsletter, Rosemary Groenwald, has served the cataloging community and the OLAC organization for many years. For the past 15 years, Rosemary has been the Head Cataloger and the Head of Technical Services at the Mount Prospect Public Library in Mount Prospect, Illinois. She supervises two MLIS full-time cataloging librarians and four full-time equivalent copy catalogers in her department. And what is her favorite part of her job? *The variety!*



Photo courtesy of Rosemary Groenwald

Rosemary is currently working on a number of projects, such as cataloging her library's new collection of Playaway Launchpad. With this project, Rosemary is deciding which RDA standards to apply to this new media format and her library's local cataloging practices. Plus, she is creating a presentation to train the catalogers on the correct application of the 385 (audience characteristics) and 386 (creator/contributor characteristics) MARC fields, and the use of the new Library of Congress Demographic Group Terms (lcdgt) vocabulary.

Rosemary has achieved many important accomplishments in her career. She has learned how to configure MARC bibliographic data to maximize its use in the library and discovery catalogs, plus been involved with the addition of new catalog and discovery systems. Additionally, Rosemary is particularly proud of becoming a NACO institution with the authority to establish name headings, series title headings, and uniform title headings, and then add them to the national authority file. Her library adds a large number of series titles for children's nonfiction materials and for adult fiction, both print and spoken word. In fact, Mount Prospect Public Library is one of the top contributing public libraries in this regard! Rosemary proudly states:

"One of the main reasons we originally underwent NACO training was in order to be able establish name authority records (NARs) for the many actors, narrators, musical groups, film production companies, etc. whose names were absent from the national authority file. While we also establish a lot of NARs for print authors, we create quite a number of NARs for persons and corporations associated with AV materials. Our activity then benefits all libraries that collect these AV items."

As part of a public library, Rosemary's department catalogs a wide variety of youth materials. Often, her library puts together its own kits. Therefore, most of these kits have not been cataloged in OCLC and require original cataloging. Additionally, some of the most interesting items she has worked with are youth circulating science kits which contain some unusual items. One includes a straw rocket launcher, a tube of lubricant, and 120 precision straws. Another is a Van de Graaff generator!

Along the way, Rosemary has been applying OLAC cataloging standards to all of her library's audiovisual cataloging since each OLAC resource was published. Plus, she adds: *"I'm a huge fan of the 'best practice' manuals that OLAC has published over the years and I can't say enough about their importance and how they always fill a cataloging void that remains unaddressed until OLAC tackles a format."*

Rosemary first became aware of OLAC via the Autocat listserv. She acquainted herself with the organization, and began following OLAC activities through the newsletter and the OLAC listserv. After attending OLAC meetings at the ALA Annual and Midwinter conferences for many years, Rosemary became a CAPC member. Currently, she is involved with several task forces:

- *Joint MLA/OLAC Task Force on Playaways*, which is in the process of drafting an OLAC Best Practice RDA guidelines for Playaways
- *OLAC Video Game Genre Headings Task Force*, which is determining if video/computer games have genre/form, and if so, to provide supporting documentation to Library of Congress in order to establish such genre headings
- *Joint OLAC/SAC Task Force on Preferred Titles for Games*, which submitted a "white paper" in the past few months to Library of Congress Policy and Standards Division staff outlining recommendations for developing policies for creating preferred titles for physical and digital games

Additionally, Rosemary is serving on several other cataloging organizations: Working Group on LCGFT Literature Terms (ALA/ALCTS Subject Analysis Committee's Subcommittee on Genre/Form), Authority Control Interest Group (LITA / ALCTS CCS - Cataloging & Classification Section), and Working Group of the ALA/ALCTS Subject Analysis Committee's Subcommittee on demographic terms.

And how did Rosemary become a librarian? It was accidental. She first worked as a paralegal and then stayed home a few years with her children. *"When I started looking for a part time job close to home I happened to see a part time job posting when I was at the library with my kids, and the rest, they say, is history. I liked working as a paraprofessional at the reference desk so much that I then decided to go to library school."* Her first library job was working at the reference desk every other weekend. After a couple of years, Rosemary was able to add some additional hours by performing cataloging for Technical Services. When the Head of Technical Services retired a few years later, Rosemary *"felt that I would really like the challenge of leading Tech into the 21st century."*

When asked "If you had one piece of advice for new librarians, what would it be?" Rosemary's concise answer: *Become a cataloger!*

Reviews

Richard N. Leigh, Column Editor

Crash Course in Basic Cataloging with RDA

by Heather Lea Moulaison and Raegan Wiechert

With a lively conversational tone, *Crash Course in Basic Cataloging with RDA* takes the intimidation out of learning to catalog with RDA. Complex concepts such as FRBR are clearly defined and discussed without jargon in easily, understandable language. Sidebars highlight important information for new catalogers, such as parts of a monograph and how to choose between multiple records for an item. While Moulaison and Raegan emphasize good cataloging practices, they also take a practical view of cataloging. They admonish the reader, “There is often more than one way to address a situation appropriately. Make a go of it, try your best and move on. Anguishing on your end does nothing in the long run.” (p. 112)

While intended for novice catalogers (either current librarians or library school students), this book also serves as a good refresher course and quick reference for the professional cataloger. The experienced cataloger, as well as the novice, will appreciate the concise, clear descriptions of complicated concepts such as Work, Expression, and Manifestation and the organization of RDA elements in MARC tag order.

Like most cataloging textbooks, *Crash Course in Basic Cataloging with RDA* approaches the subject of cataloging by moving from the theory to practice to work flow realities. It begins with a discussion of the basic principles, history, and approaches to cataloging. Then the authors introduce the various material types and types of integrated library systems. By the end of these first three chapters, the novice cataloger has a solid, albeit basic, understanding of why cataloging is important to libraries and how catalogers define various formats in a library collection.

Chapters 4 through 9 tackle the basics of how to catalog using MARC21 and RDA. This section of the book begins with a brief introduction to MARC in which Moulaison and Raegan acknowledge that they “explain just enough about MARC to make you dangerous.” (p. 25). Although the rest of the instruction involves only MARC records, they do include some information on Dublin Core and BIBFRAME. RDA is brilliantly explained in clear concise language. A flow chart removes the mystery of the FRBR entities of Work, Expression, and Manifestation. Then the application of those entities in RDA is explained by placing them in the context of a bibliographic record. Chapters 5 and 6 provide the reader the nuts and bolts of RDA cataloging in a format that is easy to navigate for ready reference. The following chapters introduce name access, subject access, and classification. The appendices provide sample RDA MARC records for various formats, a bibliography of cataloging resources, and a list of professional resources.

The final chapter of the book addresses what the new cataloger will experience in the actual workplace - copy cataloging, Z39.50, cataloging utilities, Cataloging-In-Publication, vendor records, cataloger judgment, and local practices. While the professional cataloger may be tempted to skip this chapter, there is a wealth of practical advice on avoiding the chief pitfalls of cataloger thinking - namely agonizing over whether the record is cataloged perfectly according to the rules and dealing with local practices. As the authors remind catalogers of all levels, "In the big picture, though, the longer you wait to catalog the piece, the longer patrons are deprived access." (pp. 111-112).

Pithy and full of common sense, *Crash Course in Basic Cataloging with RDA* is a resource that will be welcomed by library school students, experienced catalogers, novice catalogers, and those who train new catalogers on the job.

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Reviewed by:
Kathleen C. Koontz
Contract Cataloguer
Special Libraries Cataloguing

Digital Humanities in the Library : Challenges and Opportunities for Subject Specialists

edited by Arianne Hartsell-Gundy, Laura Braunstein, and Liorah Golomb

Digital Humanities in the Library was written “to help subject librarians understand the possibilities of digital humanities and to help them navigate relationships among faculty, students, and digital humanities librarians, and themselves” (p. xi). There have previously been several books published on the topic of digital humanities, but none were written for librarians working with faculty members on their research using digital humanities tools and methods. To achieve the goal of helping subject specialist librarians become more familiar with the digital humanities, the editors have compiled fourteen essays contributed by librarians and subject specialists at different institutions who have had a wide range of experience in working with digital humanities projects on their campuses.

Digital Humanities in the Library has been divided into four main sections, each with three or four chapters discussing the different topics. In the first section, “Why Digital Humanities? Reasons for Subject Specialists to Acquire DH Skills,” information about the relationship between subject specialists and researchers is discussed to provide context for why digital humanities projects are important for an academic library. Multiple examples are given for librarians working with both faculty and/or graduate student researchers. In order to provide the best service for digital humanities work, it may be necessary for an organization to change its way of thinking in order to successfully contribute to digital work. The theory behind digital humanities is explored to help readers understand the context in which it plays in an academic research institution.

The second section, “Getting Involved in Digital Humanities,” provides many ideas for helping subject specialists find ways to contribute to the digital humanities work on their own campus. One chapter gives information on how librarians collaborated with a faculty member to create a digital humanities project in an archeology course, including information about the assignments and projects that students worked on throughout the semester. A checklist is provided that was developed to help subject specialists work with researchers on many different types of projects. The last chapter in this section discusses ways that librarians from smaller academic institutions can get involved in digital humanities projects even if they don’t have all of the resources that larger institutions generally have.

In the third section, “Collaboration, Space, and Instruction,” there are three examples of how people from all areas of different libraries worked together to make sure that the needs of their campuses were being met in regards to digital humanities. This includes information on how librarians without an overarching knowledge of digital humanities can still participate by bringing their own specialties to the table in order to provide teaching and training opportunities for faculty, staff, and students on different tools and tasks to work on their own projects. An example of how space within a library evolved to meet the needs of digital humanities scholars is also detailed in one chapter.

The final section, “Projects in Focus: From Conception to Completion and Beyond,” has four case studies on digital humanities projects that have been completed showing readers how subject specialists and other librarians and staff have participated in varied research across different academic campuses. These projects include an example of how digital storytelling was used in a classroom setting; a project

where text was digitized and how that project changed an organization; a personal project created to teach the author how to use different tools for text mining data from scripts of a television show; and a project designed to preserve, maintain, and make a digital project available online.

One of the most valuable things about this book is that throughout all of the chapters, there are many different tools, professional organizations, and training opportunities listed for working on and learning about digital humanities projects. All of these useful resources are also compiled into an appendix with a brief annotation to help readers identify what might be useful in their own work.

I would recommend *Digital Humanities in the Library* to not only subject specialists as the title indicates, but to anyone working in an academic library. The projects related to digital humanities touched on in this book can be related to every department within a library whether or not you are working closely with departments on campus that are actively pursuing digital humanities projects. Many of the tips, tricks, and tools described in this book can help everyone working in a library better understand how library resources can be used in new and exciting ways.

Published in 2015 by: The Association of College & Research Libraries, a division of the American Library Association, Chicago, IL (xvi, 287 pages ; 23 cm) ISBN 978-0-8389-8767-4 (pbk., alk. paper-\$68.00)

Reviewed by:
Jeremy Myntti
Interim Head, Digital Library Services
J. Willard Marriott Library
University of Utah

FRBR, Before and After : A Look at Our Bibliographic Models

by Karen Coyle

In *FRBR, Before and After : A Look at Our Bibliographic Models*, Karen Coyle takes a hard look at FRBR twenty years after the final report was published. She looks at the goals FRBR intended to achieve, the implementation of FRBR into the cataloging and database environment, and ongoing efforts to utilize this conceptual model. Coyle also places the development and adoption of FRBR in the historic timeline of library cataloging, providing a well-developed picture of its fit in our bibliographic universe.

The book is divided into two parts. Part one covers the bibliographic background leading to the desire to develop a conceptual model that would encapsulate our understanding of the process leading from a creative idea to the production of an item containing that idea. Coyle also talks about the development of technology that might showcase this abstract inside the concrete nature of the library materials. In Part two, Coyle turns a critical eye on the FRBR model in an attempt to ascertain whether the model met its original goals, how well it works in reality for library catalogers, and recent and ongoing projects to expand FRBR in an effort to take advantage of the technology that has developed over the last twenty years.

Chapter one covers the history of the concept of the work and what constitutes “workness.” Coyle traces the development of the idea through library literature including the writings of Lubetzky, Wilson, Smiraglia, and Taniguchi. She also presents her own “cognitive view” of the work idea which focuses on what she believes a library patron means when using the terms “book” and “work.” The chapter wraps up with a discussion of works and relationships as well as how the “workness” idea has been incorporated into cataloging practice in the past using existing methods (i.e., the use of uniform titles).

Chapters two and three deal with the model and the technology, respectively. Coyle looks at the development of FRBR in context of various knowledge organization models, including conceptual, logical, and physical models. She places the use of these types of modeling into the evolving history of database design, from flat databases to relational databases and discusses technological models of entity-relationship (E-R) and object-oriented (OO). Coyle closes chapter two by discussing how these models have been incorporated in cataloging and how well they have met the traditional library user goals. Chapter three provides a quick high-level look at the technology of existing and future cataloging, including content and display standards like MARC and MARCXML and then introduces semantic web concepts that she hopes will be included in further developments.

Chapter four is a tiny chapter on “FRBR in context” but it contains some of the author’s strongest statements about the effectiveness of FRBR in the library environment. Coyle states that FRBR was used in RDA development before it was thoroughly tested as a library mode and near the end of the chapter states that “RDA is therefore a cataloging standard based on an unproven conceptual model.” In chapter five, Coyle also criticizes the fact that despite being intended for an international audience, FRBR was in fact developed by a very small and very homogenous group of people representing similar types of libraries, and this fact prevented true inclusiveness and universal applicability.

Chapter six provides detailed coverage of the entity-relationship model on which FRBR is built. Coyle notes that by the time the FRBR final report was published entity-relationship models had largely been replaced in system design by Unified Modeling Language, thus FRBR used modeling concepts that were dated from its start. Chapter seven covers the FRBR model and talks about the Group 1 entities. Coyle discusses how the WEMI entities have been and could be represented in a cataloging interface. She covers initiatives that attempt to implement a FRBR-based user display, including BIBFRAME. The primary point made is that the catalog does not necessarily, and probably shouldn't, distinctly display all four Group 1 entities to the end user. Group 2 and Group 3 entities are discussed on a very cursory level indicative of the lack of development for those groups. Coyle finishes chapter seven by talking about bibliographic relationships, the benefit of these relationships in cataloging, and the often-contradictory instructions regarding their use in the FRBR final report.

In chapter eight, Coyle lists the original objectives given to the FRBR Study Group and considers one-by-one whether or not that objective was met. For all six stated objectives, Coyle finds that the result was almost exclusively that it was not met. She ends this chapter by acknowledging the philosophical work accomplished by the FRBR Study Group and the impact its work will have in the history of library cataloging. However, the overall tone of this chapter displays the author's belief that FRBR development was too heavy on philosophy and too light on the practical application of that philosophy.

Chapter nine discusses three of the biggest problem areas that the author identified with FRBR: inheritance and hierarchy, disjointed entities, and aggregates. All three result in the inability to translate the FRBR model into a something that can be utilized in a practical manner by either librarians or by systems. The final chapter focuses on the semantic web and covers some of the FRBR derivatives that have been developed to take advantage of linked data. The projects covered largely attempt to replicate the FRBR model in the RDF that will enable its use on the semantic web, including FRBRer, RDA in RDF, BIBFRAME, FRBRcore, FRBRoo, the <indec> model, and FaBiO. While some of these are specific to certain user groups, others like BIBFRAME and FRBRoo show promise in enabling better incorporation of FRBR concepts into library cataloging.

I found this small book to be packed with information about the FRBR model, its history, its weaknesses, and its remaining potential. Coyle offers a blunt critique of the model and the way it's been used so far. While it is clear that there is much work needed, Coyle highlights the fact that FRBR has good philosophy underlying its content and, if it can evolve in a logical and thoughtful manner that will truly enhance the art of library cataloging, the library user will reap great rewards. With the imminent release of the draft of the FRBR library reference model, I believe that librarians will find that this book offers a great background to help understand the new draft and the reasons it is being developed.

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Reviewed by:

Jessica Hayden
Technical Services Manager
University of Northern Colorado

Keeping Time: An Introduction to Archival Best Practices for Music Librarians

by Lisa Hooper and Donald C. Force

Keeping Time: An Introduction to Archival Best Practices for Music Librarians is the ninth volume in the Music Library Association Basic Manual Series. This series, co-published by A-R Editions and MLA, provides librarians with comprehensive manuals for assistance in the successful operation of music libraries. As the authors note in the introduction to this book, there are various resources available about archival practices, but none prior to this work have focused on the issues related to archival music collections. This book fills that niche. As the title implies, it is not intended to be a comprehensive treatment of the subject, but rather an introduction that touches on all the basics and provides an overview of current best practices.

An introductory book about music archival practices must explain general archival practices, as well as those particular to music scores, recordings, etc.; a foundation must be provided for the reader unfamiliar with archival practices, and this book does that well. Music librarians—or those dealing with archival music collections within the scope of their duties—without formal education or training in archival practices will find that this book is their “go-to” resource, both for the information gleaned in an initial read and for later consultation.

Lisa Hooper, Head Music & Media Librarian at Tulane University, is well known in music librarianship circles. Her presentations at regional and national conferences are thoughtful, logical, well organized, and comprehensive, and her use of language is careful and correct. One might expect to find that this book reflects those same traits, and thankfully, it does. Donald C. Force is a library school professor at UW-Milwaukee, with research interests in the relationship between archival science and law. Both have numerous degrees that make them well qualified to author a book on this topic, and their different backgrounds make for a strong partnership in the creation of this book.

They begin with an introduction that is almost everything it should be. The intro tells the reader what will be covered, and why; what the best general resources in archives are to date; provides some background about the different types of archives; and outlines how the book is organized. There is one topic that could be covered in the introduction’s last section about how the book is organized: an explanation of boldface and italic terms. Initially I was perplexed that words in boldface are sometimes in the index, but not always (e.g.: “life cycle,” p. xii). I eventually deduced that words in boldface and a different font are defined in the glossary of the book; boldface but the same font are generally used for important concepts that are indexed but not in the glossary; and italics are used for non-English language words or for emphasis. Perhaps the authors will add an explanation in a later edition.

The main text of the book is only 96 pages, divided into eight chapters. It logically begins with the History and Development of Archives, Archival Practice, and Archival Theory, tracing archival practices from antiquity through the Middle Ages, the French Revolution, modern U.S. practices, and postmodernism. The reader should not skip this history, as various key concepts are worked into the narrative, such as the two core principles of archival science (provenance and original order).

Chapter two, Acquisition and Accessioning, provides an overview of collection assessment, donor relations, deed of gift, and accession records. The assessment checklist provided in appendix 1 is the first of the fine appendices in this book. Although the text of this chapter (and the next) explains the checklists that appear as the first two appendices, the checklists enable the reader to quickly grasp the essence of the content and provide useful, practical tools to assist music librarians.

The third chapter covers Appraisal: becoming acquainted with the collection, weeding (the reader may be surprised to learn that weeding is appropriate in music archival collections under certain circumstances), and an introduction to identifying preservation problems (covered more thoroughly in chapter six). The processing checklist of appendix 2 is a welcome and useful accompaniment. The fourth chapter, Arrangement, informs the reader on the various aspects: provenance, physical control, and intellectual control; intellectual arrangement; and physical arrangement via folders, labels, boxes, and a folder list. The black and white illustrations first appear in this chapter; at this point also study the helpful illustrations of appendix 5, “Archival Supplies.”

Description is the topic of the fifth chapter, covering the topics of cataloging, finding aids, Encoded Archival Description (EAD), and the individual elements of the finding aid. This chapter provides a very concise overview of the topics covered. I discovered one error on page 39 in the first full paragraph: “Electronic” should be “Encoded” for the first word of the EAD format.

The sixth chapter, Preservation, addresses the topics of general archival practice: office supplies, mold, insects, paper documents, photographs, sound recordings, digital media, and reading room best practices. It is in this chapter that we see the most specialized presentation of knowledge of interest to the music librarian as well as the general archivist: issues relating to scores and sound recordings. The illustrations are helpful. I would like to see more illustrations, such as of mold and insects, but the reader is referred to various resources available elsewhere to get more depth on the topics. I would also like to see some photos of reading rooms. I found a typographical error on page 72 (cf. “Cotton gloves”): “A dirty needle on a record player can irreparably scratch the record along the grooves thus reduce [sic] sound quality.” Chapter seven covers Digitization. The information in this chapter covers why to digitize, the costs, selection of resources to digitize, audio and non-audio digitization equipment, digitizing metadata, and placing images on the Web. One more typo occurs on page 75: “Society of American Archivist [sic].” The typographical/grammatical errors are very minimal in this book.

The final chapter provides a good overview of Funding, both internal and external considerations, and takes the reader through the needs regarding the institution, the collection, and the project. Advice is given for determining funding needs and identifying funding providers. As one might expect, the topic of grants is well covered in this introduction.

A total of seven appendices, notes, glossary, suggested readings, and an index round out the wealth of this book, making this the “go-to” resource for the music librarian on archival issues. It is a fine addition to the MLA Basic Manual Series. One hopes the next edition will be printed on acid-free paper. A

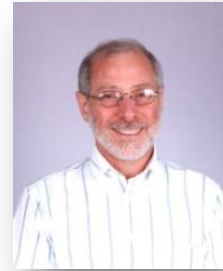
second edition in later years should also provide more updated information on digitization technology and best practices, as those continue to change (as the authors acknowledged).

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Reviewed by:
Shelley L. Rogers
Associate Professor & Senior Cataloger
Ingram Library
University of West Georgia

OLAC Cataloger's Judgment: Questions and Answers

Jay Weitz, Column Editor



Regional Planning

Question: I have in hand a movie designated for both regions 1 and 4. Which is the best way to record this under MARC 347? Maybe this:

347 video file \$b DVD video \$e region 1 \$e region 4 \$2 rda

I skimmed through the *Best Practices for Cataloging DVD-Video and Blu-ray Discs Using RDA and MARC21* guide, but I didn't see this particular scenario.

Answer: Your solution seems fine.

Before and After

Question: When I was first learning to catalog AV, I had a rule of thumb drummed into me that one should never supply a publication date or use a copyright date as a publication date for a videorecording that is before than the format in hand existed as a format. So no Blu-ray Disc should have a publication date before 2006, no DVD should have a publication date before 1993-1995, and no VHS cassette should have a publication date before 1976-1977. One should instead supply a date range for the publication date (at the broadest, a range between when the format was first released and when the item was received by the library) because it is impossible for that content to have been published in that format before that format existed. Is this actually a common practice among AV catalogers? If so, is it formally documented/recommended anywhere, and does it also apply to sound recordings (e.g., CDs "published" before 1982-1983 and standard cassettes "published" before 1962)?

Answer: This is a point that I've always made in my videorecording and sound recording cataloging workshops in a long-term attempt to spread the practice among catalogers. In [Bibliographic Formats and Standards](#) field 260 under subfield \$c, the practice has been documented for quite some time regarding videorecordings, sound recordings, and computer files, along with the best dates of first

availability that I was able to find through some research. We haven't explicitly added the same information to field 264 (although there is an oblique reference and a link to 260 in the 264 field definition). Of course, it would also be useful to link to that information from other areas of BFAS (the fixed fields DtSt and Dates, for instance), but we haven't done that yet. Here are the dates documented in BFAS:

Computer Files:

- 3 1/2 inch floppy disk: 1982
- 5 1/2 inch floppy disk: 1976
- 8 inch floppy disk: 1971
- CD-ROM: 1985
- DVD-ROM: 1996
- Electronic files remotely accessed via the World Wide Web: 1991

Sound Recordings:

- Audio cassette: 1965
- Audio CD: 1982
- DVD-Audio: 2000
- LP: 1948
- Playaway: 2005
- Reel-to-reel tape: 1949 [Thanks to Thom Pease for helping update this information]
- Streaming audio: 1999

Videorecordings:

- Beta cassettes: 1975
- Blu-ray disc: 2006
- CAV (Constant Angular Velocity) standard play laser optical discs: 1978
- CLV (Constant Linear Velocity) standard play laser optical discs: 1978
- CED (Capacitance Electronic Disc) video discs: 1981
- DVD-Video: 1996 (Japan); 1997 (USA)
- Streaming video: 1999
- U-matic/U-standard cassettes: 1971
- VHS cassettes: 1976

If you or anyone else have more accurate information about any of these dates, please share. Although *Music Coding and Tagging*, Second Edition (2001) is old, this is also documented there for sound recordings under field 260 on page 216.

Keeping Up with the BPs

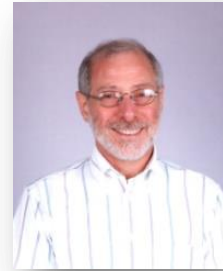
Question: I have a question about the use of 028 vs. 037 in video game records that is causing some minor consternation among catalogers here, since we generally try to follow OLAC's best practices. Some are interpreting the definitions of 028 and 037 to mean numbers on video games should go in 037, which is contrary to the OLAC BP (starting p. 36). The argument is that the MARC definition of 028 is "Formatted number used for sound recordings, videorecordings, printed music, and other music-related material." This wouldn't appear to include electronic resources such as video games. There's also a question of whether the numbers on these items are "publisher numbers." The MARC definition also has "In case of doubt as to whether a number is a publisher's number, record the number in field 500 or 037." Did the Task Force consider and reject 037 for these numbers? Were video games considered close enough to "videorecordings" that the 028 could be used? In OCLC's BFAS for 037, certain classes of numbers are explicitly excluded from the field but the only publisher numbers listed as going in 028 instead are for scores, sound recordings, and videorecordings, not electronic resources. Also, what is the difference between a standard number, publisher number, and stock number; and how does one determine which is which on a video game? The BP distinguishes between a publisher number (to be given in 028) and platform number (to be given in 024), but how was this determined? There is MARC Discussion Paper 2016-DP03 on revising 028 and 037, but unfortunately it seems to be focused on "distributor numbers" and wouldn't make any helpful changes for video games. In fact, it would seem to confuse this issue even more with the suggested change to 037 subfield \$a to add the term "audiovisual materials" which doesn't appear elsewhere in either 028 or 037.

Answer: The MARC 21 definition for field 028 harkens back to the field's origin as "Publisher Number for Music," long before its scope was expanded to include "Videorecording number" (First Indicator "4") and "Other publisher number" (First Indicator "5", the definition of which is "Other than any of the other defined values (i.e., it is not a publisher number for a sound recording, music, or a videorecording)"). The field definition should long ago have been updated and broadened to accommodate the uses covered by the First Indicators. Field 028 is entirely appropriate for the publisher numbers associated with video games, using First Indicator "5" as the examples suggest in the Best Practices. As you've noted, the MARC Advisory Committee (MAC) considered MARC Discussion Paper No. 2016-DP03, "[Recording Distributor Number for Music and Moving Image Materials in the MARC 21 Bibliographic Format](#)," at its January 2016 meetings at ALA Midwinter. The discussion paper, written jointly by OLAC and the Music Library Association, will return as a proposal that intends to better distinguish the uses of field 028 and 037. OLAC and MLA will also write the resulting proposal, of course, taking into consideration the Midwinter discussion, which included suggestions for clarification along the lines you've mentioned. As I read the discussion paper and heard the MAC discussion, the direction in which this is moving reflects the practices that many catalogers have already been trying to follow. This is to regard both publisher and distributor numbers as belonging in field 028 and to relegate mainly stock numbers to field 037. The discussion paper refers to the OLAC [Best Practices for Cataloging DVD-Video and Blu-ray Discs Using RDA and MARC21](#) as it defines stock numbers on page 56: "Stock numbers differ from the other identifiers discussed above in that the number is usually not present on the resource. It may come from a catalog, a supply list, website, etc." We shall see exactly how the

MLA/OLAC proposal turns out and exactly how the changes will be reflected in MARC 21. In the MAC discussion, though, there was clear sentiment that the best practices documents are intended to resolve any ambiguities and to fill in any gaps. Hence, I think that we can safely follow the existing OLAC (and MLA) best practices documents even while MARC 21 catches up. Once MARC 21 gets updated, we will make corresponding updates to BFAS.

News from OCLC

Compiled by Jay Weitz



Cataloging and Metadata

Cataloging Defensively Series:

Two presentations in the "[Cataloging Defensively](#)" series are now available on the OCLC Web site's "About RDA" page. The first is the general 2010 "Cataloging Defensively: 'When to Input a New Record' in the Age of DDR" slides and recorded Webinar. The second is the PowerPoint "Cataloging Maps Defensively," which was presented to the Map and Geospatial Information Round Table (MAGIRT) Cataloging and Classification Committee (CCC) at ALA Midwinter in Boston in January 2016. This session will be repeated at the MAGIRT Cartographic Resources Cataloging Interest Group at ALA Annual in Orlando in June 2016. "Cataloging Videorecordings Defensively" is scheduled to be presented at the Online Audiovisual Catalogers (OLAC) membership meeting also at ALA Annual in June. "Cataloging Sound Recordings Defensively" will be presented at the Music OCLC Users Group (MOUG) meeting in Cincinnati in March 2016. It is expected that a series of "Cataloging Defensively" presentations for various specific types of bibliographic materials will be created in coming months. The "Cataloging Defensively" presentations are not cataloging workshops, per se, but are designed to give some background to how OCLC's Duplicate Detection and Resolution (DDR) software deals with bibliographic records, both generally and for the specific bibliographic format in the title. They should help catalogers use MARC 21 and the instructions in both RDA and AACR2 to the best advantage in making sure that DDR performs appropriately when encountering a record that is legitimately unique according to the descriptive conventions.

Discovery and Reference

WorldCat Discovery Simplifies Access to Resources and Ownership Information:

January 2016 WorldCat Discovery changes will help users more easily get the resources they identify in search results. Records now display library ownership and availability information together, so searchers can more quickly determine how to obtain needed items. Links to materials available electronically appear first, so users can conveniently connect directly with available online resources. For items not available online, users can view a list of libraries that own an item, with the closest libraries appearing first. Emailed lists of records now contain the following information (newly added data indicated in **bold**):

- Title (**now hotlinked**)
- Author

- Format, Date, Peer Reviewed
- **Source (Journal name and information)**
- **Publication information**
- **ISBN**
- **ISSN**
- OCLC Number
- Database Name
- **Call Number and Shelving Location (for libraries with the Availability option only)**

Additional details about [January 2016 WorldCat Discovery enhancements](#) is provided in WorldCat Discovery Release Notes January 2016. New content now available in WorldCat Discovery, WorldCat Local, and WorldCat.org includes:

- International Law & World Order: Weston's & Carlson's Basic Documents from Brill
- LUP Publications from Liverpool University Press
- Theological Research Exchange Network E-Documents from Theological Research Exchange Network
- JSTOR Arts & Sciences XIV Collection from JSTOR
- Schattauer Publishers from Schattauer

New content now available in WorldCat Discovery and WorldCat Local includes:

- Popular Medicine in America, 1800-1900 from Adam Matthew Digital

A [complete list of databases in the central index](#) can be downloaded (Excel, 962 KB).

OCLC Signs Agreements with Leading Publishers Worldwide:

OCLC has signed agreements with leading publishers to add metadata for books, e-books, journals, databases, and other materials that will make their content discoverable through WorldCat Discovery Services. OCLC has agreements in place with more than 200 publishers and information providers to supply metadata to facilitate discovery and access to key resources. OCLC recently signed agreements with the following content providers:

- Adfo Group, based in Amsterdam, the Netherlands, is a market leader in the field of marketing and communications publications. Its program includes magazines like *Adformatie* and *Tijdschrift voor Marketing*, newsletters, and training programs.
- American Society of Mechanical Engineers (ASME), based in New York City, USA, is a not-for-profit membership organization that enables collaboration, knowledge sharing, career enrichment, and skills development across all engineering disciplines. ASME seeks to deliver locally relevant engineering resources to advance public safety and quality of life throughout the world.
- Artstor, based in New York City, USA, provides the Artstor Digital Library of more than 2 million high-quality images for teaching and research, and Shared Shelf multimedia collection

management software for institutions to manage, catalog, and share their digital media locally or on the Web.

- Blackstone Audiobooks, based in Ashland, Oregon, USA, is one of the nation's largest independent audiobook publishers, offering over 10,000 unabridged audiobook titles, plus more than 150 new releases each month, including titles from Blackstone, Hachette, HarperCollins, Harlequin Audio, christianaudio, and Penguin Random House.
- Henry Stewart Publications, LLP, based in London, UK, is a leading publisher of peer-reviewed, vocational journals that support employability and career development.
- Klett-Cotta, based in Stuttgart, Germany, publishes journals and books from a broad range of subject areas such as literature, fantasy, general non-fiction, history, politics, philosophy, psychotherapy, psychoanalysis, psychology, and education.
- ODILO, based in Madrid, Spain, is a leading solution in Europe and Latin America, offering a comprehensive product suite for the discovery, management, and distribution of library print and digital materials.
- Schattauer, based in Stuttgart, Germany, publishes in Medicine and Natural Science. The main pillars of the publishing house are its renowned textbook program with over 1,200 available books, ebooks, and digital data, and 21 national and international scientific journals.
- Ulverscroft, based in Leicester, UK, specializes in publishing unabridged large print books and unabridged audiobooks, and supplies these shelf ready copies to public libraries. Ulverscroft also distributes ebooks to public libraries.
- Wolters Kluwer, based in Alphen aan den Rijn, the Netherlands, is a global leader in professional information services. Professionals in the areas of legal, business, tax, accounting, finance, audit, risk, compliance, and healthcare rely on Wolters Kluwer's market leading information-enabled tools and software solutions to manage their business efficiently, deliver results to their clients, and succeed in an ever more dynamic world.
- Wolters Kluwer Health, based in Philadelphia, Pennsylvania, USA, is a leading global provider of information for the healthcare industry and publications in Medicine, Nursing, and Allied Health.

Metadata from some of these publishers will also be made available to users through other OCLC services based on individual agreements. Details about how this metadata may be used in library management workflows will be communicated to OCLC users as the data is available. By providing metadata and other descriptive content for more than 1.9 billion resources, these partnerships help libraries represent their electronic and physical collections more completely and efficiently.

Management Services and Systems

OCLC Sustainable Collection Services Extends GreenGlass to Support Groups:

OCLC Sustainable Collection Services (SCS) now supports shared print monograph projects through its GreenGlass application. GreenGlass group features extend collection visualization and interactivity to consortial or regional collections, enabling participating libraries to better understand and manage their shared collection. GreenGlass, an interactive decision-support application, has been used by individual libraries to identify retention, transfer, and withdrawal candidates for individual libraries based on usage

and holdings in other libraries. Guided by input from librarians, SCS has extended GreenGlass capabilities to support group data sets, and to introduce new group-level tools. New GreenGlass group functionality includes real-time modeling of retention scenarios based on multiple factors, and a suite of group-level collection visualizations. These are designed to inform and facilitate decision-making among shared print partners. As library collections move from print to digital, and spaces once used to house books are now dedicated to users, librarians need data and tools to help curate onsite collections, and to collaborate on retention and storage. GreenGlass group features offer a tool built expressly for that purpose. SCS services use WorldCat to inform which titles should be kept locally, which can be discarded, and which can be considered to be kept in shared collections. SCS is the leader in analyzing print collection data to help libraries manage and share their materials. OCLC acquired SCS in January 2015.

Erasmus University Rotterdam Selects OCLC WorldShare Management Services:

Erasmus University Rotterdam, one of the largest universities in the Netherlands with over 24,000 students and a research community of approximately 1,400 scientists, has selected OCLC WorldShare Management Services as its library management system. [WorldShare Management Services](#) (WMS) is a complete, cloud-based library management system that offers all the applications needed to manage a library, including Acquisitions, Circulation, Metadata, Resource Sharing, License Management, and a single-search Discovery interface to connect library users to the information they need. WMS also includes a range of Reports based on local data that help libraries understand their activities and track key metrics over time. The EUR is a member of the UKB-consortium, which comprises 13 Dutch university libraries and the National Library of the Netherlands. In 2014, the UKB has signed an agreement with OCLC to move library services to the WorldShare platform. Today, more than 380 libraries worldwide are using WMS to share bibliographic records, publisher, and knowledge base data, vendor records, serials patterns, and more. With WorldCat at its foundation, WMS enables libraries to draw on the collaborative data and work of libraries worldwide for more efficient workflows. WMS also provides libraries with the unique opportunity to share innovation, applications, infrastructure, vision, and success in serving their users.

College of Europe Selects OCLC WorldShare Management Services:

The College of Europe (Bruges campus), an independent university of postgraduate European studies, has selected OCLC WorldShare Management Services as its library management system. The College of Europe is the first Belgian institution to join the WorldShare Management Services community.

EZproxy 6.1.10 Available The current release of EZproxy took place on 2015 December 15. This release contains updates and bug fixes identified in EZproxy v6.1.6:

- **New default needhost.htm page:** This updated message will provide additional information for both EZproxy administrators and end-users in its default version. This update will not overwrite any customized needhost.htm pages.
- **EZproxy supports Secure Name Indication (SNI):** Content providers have begun using SNI in conjunction with their secure web servers. EZproxy now supports proxying access to these web servers as long as EZproxy has been configured to support SSL.

- **IntruderIPAttempts** functionality was disrupted by EZproxy 6.0 but has been restored.

The [release notes](#) are available. OCLC ended support for EZproxy versions prior to 5.7.44 as of 2015 December 31. It was highly recommended that you upgrade to 5.7.44 prior to this time. [Download 5.7.44 and read details on the upgrade process](#). EZproxy versions 5.7.44 and 6.x will continue to be supported.

Digital Collections Services

CONTENTdm Update, December 2015 News and events related to CONTENTdm and the user community include:

- Celebrating CONTENTdm Collections. Denver Public Library launches the Rocky Mountain News digital photograph archives.
- Featured "in the news." CONTENTdm users and their digital collections are frequently in the library community's online publications and sites. See the CONTENTdm digital collection site from The Cleveland Public Library.
- Library staff share their experiences with CONTENTdm. Watch the video from PALNI about using CONTENTdm to share special collections.

Read the [complete quarterly CONTENTdm Update](#) electronic newsletter.

Washington State Library Illuminates Rural Digital Collections with Visual Mapping:

With OCLC's CONTENTdm, libraries can increase the visibility of digital collections and make them more discoverable. CONTENTdm enables the storage, editing, and display of digital collections, making them accessible online for searchers worldwide. In 2015, the Washington State Library added a visual mapping tool to several of its digital collections, which are powered by CONTENTdm. The Washington Rural Heritage Collection and the Colville National Forest Heritage Collection use StoryMap JS, a free, open source tool for geo mapping created by Northwestern University's Knight Lab. The Washington State Library has embedded this tool in its CONTENTdm websites, allowing users to browse maps and explore collections geographically. Users can click on map locations of Washington state, and can view links and short blurbs about digital collections from specific areas. Digital items such as images and videos are available from these collections. This visual mapping makes it easier for users to find what they are looking for in the digital collections sites, and it provides for novel uses of the state library's data. The state library's institutional partners, such as the United States Forest Service, are helped by the sites, which draws attention to lesser known communities and collections in Washington. In the near future, the state library's items will also appear in the Digital Public Library of America's (DPLA) map. The visual mapping functionality is made possible by adding geo-referenced information (latitude and longitude coordinates) to the digital collections. The state library works with library staffers at institutions throughout the state to add these coordinates; interns and volunteers also contribute to the effort. The Washington State Library also uses the CONTENTdm API and Timeline JS, also from Knight

Lab, to tell the story of a pioneer family. This collection, the Mount Baker Foothills Collection, features a timeline that calls up images directly from the library's digital collections using the CONTENTdm API.

Resource Sharing

WorldShare Interlibrary Loan Fee Management Changes:

On 2015 December 1 at 12:01 am US Eastern time, IFM payments began to be triggered when the lender marks the request as Shipped. The ability to grant IFM refunds is targeted for an early 2016 release. In the History tab for each request, you can review IFM details and track success or failure of IFM payments.

WorldShare Interlibrary Loan Users:

- For WorldShare Interlibrary Loan requests placed 1 November through 30 November that are in Shipped status, but not yet marked Received, OCLC will retroactively trigger the payment on those requests on 1 December. No action from the library is required.
- For WorldShare Interlibrary Loan, requests placed between 1 January and 30 November with "problem" statuses (e.g. Received? Not Received), no payments will be triggered.

ILLiad Users:

- For ILLiad requests placed 1 November through 30 November that are in Shipped status, but not yet marked Received, OCLC will retroactively trigger the payment on those requests. No action from the library is required.
- For ILLiad requests placed between 1 January and 30 November with "problem" statuses (e.g. Received? Not Received), no payments will be triggered.
- Note that ILLiad libraries should be diligent when marking items as Shipped to ensure IFM charges are rendered appropriately. ILLiad libraries that change a request status from Shipped to Undo Shipped within the same day of setting Shipped will automatically receive a refund for that change. This action does not require the refund service or a dummy request.

If you have any questions about the new IFM trigger, please reach out to [OCLC Support](#).

Member Relations, Advocacy, Governance, and Training

31 New Webinars Added to the WebJunction Catalog:

The [WebJunction Course Catalog](#) provides free access to library-focused self-paced courses and webinar archives. Through the generous support of OCLC, the Gates Foundation, and many state library agencies across the U.S., WebJunction continues to provide timely and relevant learning content for you to access anytime, from anywhere. Covering the topics of outreach, programming, technology, social media, and so much more, 182 webinar archives are currently available, produced by WebJunction or by one of our content collaborators: TechSoup, Infopeople, NCompass Live, and ALCTS. And with each course or webinar you complete from the catalog, you will earn a certificate of completion. [Visit](#) to browse all

courses and webinar archives.

OCLC Research

Data Modeling and Reuse Project Receives NEH Grant:

OCLC Research joins colleagues from Stanford University, the University of Michigan, and the Institute for Field Research (IFR) in assisting the Alexandria Archive Institute (AAI) on a three-year data modeling and reuse project that has been funded by the National Endowment for the Humanities (NEH). This longitudinal study of archaeological data creation, management, and reuse practices in three geographical areas (North Africa, Europe, and South America) will investigate data quality and modeling requirements for reuse by a larger research community. The project, which launched 2016 January 1, will improve the quality of information collected during archaeological excavations across the globe, preserve this information, and share it with the public. Outcomes include exemplary open datasets, an expansion of Open Context's data publishing services, and online educational modules. By funding this project, the NEH is showing a strong commitment to making quality humanistic research more accessible to the public. The Alexandria Archive Institute is a non-profit entity that supports research and development to enhance scholarly communications and instruction through innovative use of the Web through Web-based publication with a focus on primary data—information that rarely sees dissemination. OCLC Research is collaborating with project partners to share outcomes that consider the entire data lifecycle when developing approaches to align data creation and field management practices with preservation, dissemination, and reuse requirements. As a co-investigator on the project, Research Scientist Ixchel Faniel, Ph.D. is working with the team to interview and observe archaeologists doing field work in the three geographical areas and archaeologists interested in reusing data from those areas. See the [AAI news release](#) for more information about this project.

OCLC Research and ALISE Announce 2016 Research Grants:

OCLC Research and the Association for Library and Information Science Education (ALISE) have awarded research grants for five projects to be conducted by 10 researchers. The awards were presented 2016 January 7 at the ALISE 2016 Annual Conference Awards Luncheon in Boston, Massachusetts.

- Iris Xie and Rakesh Babu, University of Wisconsin-Milwaukee, will investigate universal accessibility of digital libraries with specific work on design of Help mechanisms for blind users. This project provides not only a theoretical contribution by helping to understand the blind users' help-seeking behaviors, but also a practical contribution by offering an iterative design of accessible and usable Help features for blind users.
- Abdulhussain Mahdi and Arash Joorabchi, University of Limerick, will pursue the development of an algorithm for automatic mapping of FAST subject headings to their equivalent Wikipedia articles or topic. The proposed mapping algorithm deploys various text mining techniques such as string matching, explicit semantic analysis, and citation analysis to find the best matching article for a given FAST term.

- Besiki Stvilia, Florida State University, Dong Joon Lee, Texas A&M University, and Shuheng Wu, Queens College, CUNY, will investigate the social aspects of participation in online research identity management systems. The study's findings can inform the design of research identity data/metadata models, data quality assurance activities, mechanisms for recruiting and retaining researchers for provision and maintenance of identity data. The study can also inform teaching of data curation and research data repository management in Library and Information Science schools.
- Pengyi Zhang, Peking University, will investigate collaborative sensemaking in online knowledge groups. This research aims to answer the question, "How do people with collaborative tasks construct knowledge structures and fit data into the structures collectively in online knowledge groups?" The proposed research will advance theoretical understanding of collaborative sensemaking and provide guidance for empirical research and education of sensemaking skills.
- Denice Adkins and Heather Moulaison Sandy, University of Missouri, will identify ways in which multiple Latino populations use mobile technologies for information-seeking; use social media for information-seeking; and based on that knowledge, create "profiles" for various Latino communities (i.e. rural, urban, established communities, newcomer communities, etc.) that can be used by libraries to tailor their social media and mobile information campaigns.

OCLC/ALISE Library and Information Science Research Grants support research that advances librarianship and information science, promotes independent research to help librarians integrate new technologies into areas of traditional competence, and contributes to a better understanding of the library environment. Full-time academic faculty (or the equivalent) in schools of library and information science worldwide are eligible to apply for grants of up to \$15,000. Proposals are evaluated by a panel selected by OCLC and ALISE. Supported projects are expected to be conducted within approximately one year from the date of the award and, as a condition of the grant, researchers must furnish a final project report at the end of the grant period. [More information](#) about the OCLC/ALISE Library and Information Science Research Grant Program and a list of previous grant recipients are available on the OCLC website.

If You Build It, Will They Fund? Making Research Data Management Sustainable:

Some research libraries have been proactive in taking on the new role of supporting the research data management needs of researchers and the university, whereas others have been assigned this role without having sought it. Either way, additional financial or personnel resources rarely are in place to implement and sustain this activity. The brief document, [If You Build It, Will They Fund? Making Research Data Management Sustainable](#) by Ricky Erway and Amanda Rinehart, explores the pros and cons of seven possible funding sources. It also describes the current circumstances in seven countries outside the United States. Among the highlights:

- Because some research data is a valuable university asset, institutions should build ongoing funding into their base budgets to provide resources to the units responsible for managing that asset.

- The seven funding strategies include obtaining institutional budgetary support, adding to grant budgets, charging data depositors, charging data users, establishing an endowment, using existing funding for data repository development, and making do with existing budgets.
- Another option is to outsource to external data repositories, although many make no effort to meet digital preservation standards.

Data management underpins current and future research, funder mandates, open access initiatives, researcher reputations, and institutional rankings. While it is widely recognized that data management support is necessary, recognition that it requires sustainable funding is slower in coming. Even as the community is beginning to understand the costs, it must begin to address how data management might be funded. This brief report provides an overview of seven funding strategies and their standing in the US. Circumstances in seven other countries are described in the appendix. This work is part of our research collections and support efforts to inform current thinking about research collections and the emerging services that libraries are offering to support contemporary modes of scholarship. We are encouraging the development of new ways for libraries to build and provide these types of collections and deliver distinctive services. For more information about this specific effort, see our [role of libraries in data curation projects](#).

OCLC Research Library Partnership Welcomes Three Recent Additions:

OCLC Research is delighted to announce three additions to the OCLC Research Library Partnership:

- Stellenbosch University, a leading public research university, is our first Partner in South Africa. The Partner Representative is Ellen R. Tise, Senior Director, Library and Information Service.
- Università Cattolica del Sacro Cuore (UCSC) is the largest private university in Europe and the largest Catholic university in the world. It extends our partnership to southern Europe. The Partner Representative is Dr. Ellis Sada, Head of Central Library, Milan Campus.
- The University of Sheffield, a member of the Russell Group of 24 leading research universities in the United Kingdom, ranked number one in the UK for student satisfaction in the 2014-2015 Times Student Experience Survey. The Partner Representative is Tracey Clarke, Associate Director for Academic & Digital Strategies.

We look forward to collaborating with these three institutions' library staff on projects that benefit all research libraries and their users. The [OCLC Research Library Partnership](#) currently comprises 170 Partner institutions around the world.

Shaping the Library to the Life of the User:

[Shaping the Library to the Life of the User: Adapting, Empowering, Partnering, Engaging](#), by Merrilee Proffitt, James Michalko, and Melissa Renspie provides a recap of the October 2015 [Library in the Life of the User](#) meeting that featured insights about ways libraries can provide more meaningful support based on what students, scholars, and other library users really do. Among the highlights:

- Users increasingly have choices outside the library, and those choices are both networked and social.

- It is far too easy to make incorrect assumptions about users' needs and motives. Mixed methodologies, including practices based in ethnography and design, help libraries to better understand their constituents and to make wise choices.
- Libraries need to adapt, empower, partner, and engage in order to successfully shape their future services around users' needs.

What began with a few libraries' early application of ethnographic methods to learn more about user behaviors and needs has grown to become a significant body of work done across many institutions using a broad range of methods. User-centered investigations are increasingly influential in discussions about the shape and future of the research library. User-centered design that builds on such work is becoming deeply embedded in library planning and service development in some research libraries. This brief report captures several topics covered at the October 2015 *Library in the Life of the User* meeting which include: environmental factors that are driving libraries to reconsider their role; the range of users served by libraries; the range of choices that will be made when undertaking user research; and achieving a balance between serving the needs of user communities and fulfilling institutional goals. Additionally, the report encapsulates considerations and guidelines for planning and conducting a study. Finally, the report records some core themes that flowed out of the meeting—the need to adapt, empower, partner, and engage, and concludes with some suggestions for future action. The intended audiences for this publication include librarians, information scientists, and library and information science students and researchers as they think about new ways to provide user-centered library services and to conduct research that will inform practice in ways to engage and build relationships with users and potential users. This work is part of our [user studies theme](#), in which we study the ways in which individuals engage with technology; how they seek, access, contribute, and use information; and how and why they demonstrate these behaviors and do what they do. The goal of this work is to provide the library community with behavioral evidence about individuals' perceptions, habits, and requirements to ensure that the design of future library services is all about the user.

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