

2020

OLAC NEWSLETTER



2020 Virtual Conference

Volume 40

Number 4

December 2020

THE OLAC NEWSLETTER

The OLAC Newsletter (ISSN: 0739-1153) is a quarterly publication of the Online Audiovisual Catalogers, Inc. appearing in March, June, September and December. Permission is granted to copy and disseminate information contained herein, provided the source is acknowledged.

EDITOR-IN-CHIEF

Laura Kane McElfresh
University of Minnesota Libraries
309 19th Avenue South
Minneapolis MN 55455
mcelf008@umn.edu

ADDRESS AND EMAIL CHANGES

Jennifer Eustis
W.E.B. Du Bois Library
University of Massachusetts Amherst
154 Hicks Way
Amherst MA 01003-9275
jeustis@umass.edu

BOOK REVIEW EDITOR

Richard N. Leigh
Ball State University Libraries
2000 W. University Avenue
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

Yoko Kudo
University of California, Riverside
900 University Avenue
Riverside CA 92521
yoko.kudo@ucr.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

Laura Kane McElfresh



The first OLAC Virtual Conference and 40th Anniversary Celebration seems to have been a great success! Recordings and other conference materials will be available soon with first access for conference attendees via the [conference website](#) (use your conference login), but then after a short while they will be freely available to everyone. In the meantime, please see the [special conference section](#) on Page 47. Thanks to everyone who contributed as a conference reporter and special thanks to Jan Mayo for coordinating all those reports!

For opportunities to get involved with OLAC as a candidate for office or a CAPC member, please see our calls for OLAC participation (page 29).

Contents

From the President	4
From the Secretary	5
From the Treasurer	14
MOUG-OLAC Liaison Report	17
News and Announcements	18
From the Outreach/Advocacy Coordinator	19
Members on the Move: John DeSantis & Jen Bolmarcich	20
In the Spotlight with Alex Whelan	23
OCLC Global Council Update	26
Call for OLAC Participation	27
News from OCLC	29
OLAC Cataloger's Judgment Q&A	43
ALA Meetings of Interest	46

Special Conference Section: OLAC @ 40

OLAC Conference Wrap-Up	47
Conference "Group" Photo	48
Nancy B. Olson Award Recipient's Statement	48
Conference Reports	50
OLAC Scholarship Winners' Reports	81

From the President

Kristi Bergland



Dear OLAC members,

As many of you will have experienced, OLAC recently held another exciting and successful conference, all while celebrating our 40th anniversary! Many thanks to the Conference Planning Committee, led by Hayley Moreno, Bryan Baldus, and Autumn Faulkner, who worked on planning an in-person conference at OCLC in Dublin, Ohio and then turned on a dime to convert it to a wonderful online event. There were around 300 attendees at our first ever online conference, with many attending for the first time.

Looking forward, the Executive Board is discussing revisions to some of the board positions, with the hopes that balancing position duties will make for improved efficiencies and may make recruiting for open positions easier. Changes to the position descriptions and by-laws need the approval of the membership, so keep your eyes open for further discussion.

Speaking of board positions and other future opportunities, I would like to encourage any OLAC member to consider becoming more involved with the organization, as a candidate for an OLAC board position, a full or associate member of CAPC, a contributor to task forces, or a volunteer in planning our next conference. Please feel free to contact me (bergl007@umn.edu) if you have questions about available opportunities or any questions or suggestions for the good of the organization. I look forward to hearing from you!

From the Secretary

Nicole Smeltekop

OLAC Conference 2020 Membership Meeting

October 15, 2020, 11:00AM -12:00PM (EDT)

Via Webex



Attendees: Larinda Gruber, Laurene Harneck, Heather Pretty, Marcia Barrett, Barbara Tysinger, Thomas Whittaker, Jeannette Ho, Carissa Malmgren, Maria Ho, Jeremy Myntti, Pam Skittino, Cassie Domek, Rita Nuxoll, Wendy Sistrunk, Amanda Scott, Mary S. Konkel, David Procházka, Betsy Ferwerda, John DeSantis, Hsianghui Liu-Spencer, Marie-Pier Lyonnais, Jennifer Page, Sevim McCutcheon, Violet Fox, Autumn Faulkner, Deborah Ryszka, Tom Campbell, Jennifer Richmond, Bryan Baldus, Bobby Bothmann, Kisa Bennett, Lindsay Hiltunen, Richard N. Leigh, Ann Kardos, Scott M. Dutkiewicz, Heidi Margold, Ethan D'Ver, Martha Schmidt, Joy Anhalt, Bruce J. Evans, Darlene Townsend, Shelley Stone, Hannah Spence, Liz Kielley, Jan Mayo, Kelley McGrath, Mara Marrin, John Galdun, Robert Cunningham, Margaret Mutka, Laura Kane McElfresh, Kelly Mitchell, Amy Mihelich, Julie Moore, Cathy Lutz, Amanda Mack, Lauren Erwin, Laura Tynan, Geo Flores, Linda Roholt, Kathleen Aufderhaar, Alan Mark, Heather McIntosh, Lucy Owen, Janice Bunker, Eliot Williams, Alison McClanahan, Treshani Perera, Brinna Pam Anan, Brian Falato, Amy Strickland, Sarah Hovde, Catherine Lamoureaux, Roman Panchyshyn, Sara Luellen, Mary Huismann, Linh Chang, Peter H. Lisius, Toby Bernstein, Kristi Bergland, Emily Crea, Lynn Gates, Kathryn Lybarger, Rachel Fager, Kay Johnson, Michelle Cronquist, Elizabeth McCormick, Debra Spidal, Jay Weitz, Nicole Smeltekop (139 attendees)

Welcome and Introductions

- Called to order 11:08 am EDT
- Kristi introduced the board.

Announcements

- Call for Candidates for Election (Mary Huismann)
 - Calling for candidates for Vice President/President-Elect and Treasurer this year.
- Conference Scholarships (Mary Huismann)
 - Two conference scholarships were awarded this year. They were given to Marie and Janice Bunker.
 - Thanked Emily Crea and Kathy Lutz for their service on the committee.
- Presentation of Nancy B. Olson Award (Kristi Bergland)
 - Presented to Kay Johnson.
- Olson Award nominations open (Thomas Whittaker)
 - Nominations for the 2021 Nancy B. Olson Award are due Dec. 1st. Please see the [OLAC website](#) for eligibility and nomination requirements.

Officer Reports

- President's Report (Kristi Bergland)

- Thomas Whittaker, Emily Creo, and Kristi Bergland will be meeting to reevaluate the OLAC research grant, with particular attention to how we can improve the application process, to encourage more interest, reduce barriers to apply, and see how it can be used to improve our visibility and the visibility of our research.
- CAPC Co-chairs Nariné Bournoutian and Alex Whelan were officially appointed this fall.
- CAPC member Meghan Bergin's term will be rebooted. She will serve a two-year term starting this year.
- MOUG OLAC Screencast Collaboration task force has completed their work. The first videos focus on remote technical services work. Bergland encouraged everyone to subscribe to the channel. Suggestions for future content welcome, and there will be opportunities for people who want to be involved in production support as well. Thank you to those who worked on the task force.
- Thank you to the Conference Planning committee for their excellent work and agile support of this conference.
- Thanks also to all the presenters.
- Vice President's Report (Emily Creo)
 - In addition to developing communication/membership/webpage recommendations, the Communications & Membership Taskforce has discussed the prospect of offering new opportunities for virtual networking and continuing education sessions throughout the year between conferences/meetings to enrich OLAC member experience.
 - With ALA meeting uncertainty, we need to take a look at adjusting our bylaws language to ensure we can maintain our usual schedule and member communication structure even if anything shifts in that organization's traditional meeting schedule
 - Formal announcement of the OLAC research grant delayed to update application materials, compile past recipient information on the webpage, and possibly expand the scope of acceptable projects, larger revamp to occur
- Secretary's Report (Nicole Smeltekop)
 - The June 2020 Newsletter includes OLAC Executive Board minutes for March 23, May 6, and May 21 meetings.
 - The September 2020 Newsletter includes OLAC Executive Board minutes for the June 8th meeting, the June 29th Virtual Membership meeting, and the June 26th CAPC meeting
 - The bylaws approved in June 2020 have been incorporated into the OLAC bylaws. The bylaws have now officially been separated from the executive board handbook. The bylaws updates have been forwarded to the web developer for inclusion on the website. The handbook will now be an internal document for the executive board and saved on our Google drive.
- Treasurer's Report (Jennifer Eustis)
 - Q1 Report (ending 9/30/2020)
 - The Membership Portal has been redesigned for the 2020 Conference. There are now Member only pages where we will provide Members with a first look at the Newsletter and Membership meetings. We now have an OLAC YouTube site.
 - The 2020 Conference has provided its usual bump to our membership numbers. Our last quarterly report had 204 regular members and 22 institutional members for a total of 226 members. As of our Q1 2020 report, we have 248 regular members and 23 institutional members.

- There is now a new Student 1-year membership. The Communications & Membership Task Force will be reviewing institutional memberships as this particular level causes some confusion.
 - We have closed the registration part of the 2020 Conference. We need to take care of the stipends and live captioning fees. We should have this wrapped up by Q2. We need to find ways to sustain this surge in membership.
- Outreach/Advocacy Coordinator's Report (Ann Kardos)
 - The Communications & Membership Task Force will be meeting one final time at the end of October and are preparing a recommendation for the Board
- Newsletter Editor's Report (Laura Kane McElfresh)
 - McElfresh recently started as Newsletter Editor and her first issue was September 2020.
 - First one to be published with early access in [OLAC Membership Portal > Members' Corner](#), then freely available after a fairly short while
 - Jennifer Eustis' idea -- position the Newsletter as a membership benefit
 - Only 2 ppl had trouble accessing the issue; resolved in a couple days
 - 68 ppl (about 60% of membership) viewed the September 2020 issue
 - Submissions for December issue due November 15th; call/reminder will come out soon
 - We will continue to publish Conference reports; in email discussion, Mary Huismann provided good reasons why published reports remain relevant
- CAPC Report (Nariné Bournoutian and Alex Whelan)
 - Alex and Nariné introduced themselves and the new members of CAPC. They summarized reports presented at the CAPC meeting held Oct. 13 earlier at the conference.

Updates

- [MOUG-OLAC Screencast Collaboration Task Force report](#) (Nara Newcomer)
 - The MOUG-OLAC TF began work in fall 2019 towards collaborating to create a screencast. Planning work was done by March 2020, and then COVID resulted in a delay and a shift in topic focus on "Remote Technical Services." Each is under 15 minutes and posted on the [MOUG-OLAC YouTube channel](#). Together, screencasts have been viewed 684 times to date.
 - Julie Moore's [Cataloging Cool Objects](#) in these uncertain times using RDA and MARC21. Julie talks about cataloging all your crazy objects, including direwolf and smilodon skull fossil models and much, much more!
 - Damian Iseminger describes [managing music technical services during a pandemic](#). He addresses telework challenges for music catalogers and some creative solutions and workarounds used at the Library of Congress Music Division.
 - Looking for tips to boost your efficiency in OCLC tools? Check out [Terry Simpkins and AutoHotKey](#)! Terry demonstrates how he uses AutoHotKey to supplement the built-in macros, text strings, and constant data records in OCLC's Connexion.
 - Now that infrastructure is in place, the main work of additional screencasts will be for presenters to create the actual content. Some administrative overhead would be needed. The task force submitted recommendations for future work to the MOUG and OLAC Boards.
- Website Steering Committee (Matt Burrell)
 - Last year compared to the previous year we saw a slight decline of website usage (a 6% drop with 40,000 users)

- I compared the last three years to the three years previous and found that we had an increase of users from 110,000 to 113,000. Site use is up over time.
- The site reaches users in 113 countries and 111 different languages.
- Thank you to Autumn Faulkner, Jennifer Eustis, and Ann Kardos for their help over the past year.
- Plan for the future once the conference is over and things settle down is to move the website into a Drupal 9 platform from its current Drupal 7. Drupal 9 is much easier to use and contains features that would make changes easy.
- OCLC Update (Jay Weitz)
 - Reviewed News from OCLC prepared for October OLAC Conference. See Jay’s full “News from OCLC” column on Page 29.
- OLAC-MOUG Liaison (Autumn Faulkner)
 - MOUG is the Music OCLC Users Group. Their special focus is the cataloging and discoverability of music resources as facilitated through OCLC, but they are a good group for general music cataloging guidance too. Many OLAC members are also members of MOUG, and vice versa. My job as liaison is to keep the membership of both groups informed about each other’s work.
 - MOUG’s in-person conference took place in February 2020. Conference presentations are available on the [MOUG Conference website](#).
 - The 2021 conference is planned for March 2-3, 2021. MOUG is currently planning a hybrid format for that conference. Watch for more news on the MOUG listserv
 - Three new OLAC/MOUG screencasts are now available on the [OLAC/MOUG YouTube channel](#). These include:
 - Cataloging Cool Objects – Julie Moore
 - Managing music technical services during a pandemic – Damien Iseminger
 - Auto HotKey – Terry Simpkins
 - The MOUG Executive board released a statement on recent events of racism and racially motivated violence
 - Excerpt: “Within our organization and our profession we all CAN and WILL: amplify the voices of our members of color; do more to ensure our BIPOC (Black, Indigenous and People of Color) members experience a safe and welcoming environment; and do our level best to grow diversity, equity, and inclusion.”
 - Full statement (“[About Recent Events](#)”) is on the MOUG website
 - Watch for more discussion of potential updates to the MOUG mission statement and a new DEI statement as a way to “clarify MOUG’s identify and substantiate its intent,” as Chair Michelle Hahn notes in the September newsletter.
 - The MOUG Executive Board has some updates. Heather Fisher, Secretary and Newsletter Editor and Kevin Kishimoto, Continuing Education Coordinator began their terms in 2020.
 - The election period just closed for officer terms beginning in 2021; watch for news on MOUG-L. These officer positions are: Vice Chair/Chair-Elect, Treasurer-Elect, and Reference, Discovery, and Collection Coordinator.

Adjourned at 11:58 am EDT.

CAPC Meeting: OLAC 2020

Tuesday, October 13, 2020

4pm-6pm EDT

53 Participants

1. Welcome and introductions (Whelan and Bournoutian) – Alex and Nariné introduced themselves. They are co-chairs for their 2020-2022 terms.
2. Approval of Minutes from meeting at ALA Annual 2020 (Bournoutian) – Minutes approved.
3. Announcements (Whelan)
 - a) Membership meeting Thursday, October 15, 11am-12pm EST – Alex and Nariné will be presenting at the membership meeting on the CAPC meeting.
 - b) Welcome to new members! – Peter Rolla and Megan Berga are new full members. Allison and Julia are new associate members.
4. Reports (Bournoutian):

Liaison Reports:

- a) CC:DA (McGrath)
 - o The RDA Steering Committee is meeting virtually this week and next week. The agenda includes the internationalization of the toolkit, time span and units of time, vocabulary for types of binding and an RDA proposal for new elements for creator agent of work.
 - o A new release for the toolkits came out Sept. 16th. This is the last update to the beta RDA site. The beta will switch to the official version December 2020.
- b) MAC (Gerhart)
 - o There are still a number of MARC fields and subfields needed to support the new toolkit. MAC is currently working on metadata provenance.
- c) LC (Young) – No report.
- d) OCLC (Weitz)
 - o There are new WorldCat Matching release notes in August 2020. WorldCat Validation release notes were also released in August.
 - o REALM project has new updates on the length of time the COVID-19 virus lives on library materials. The new update includes AV materials. Jay will give a fuller report at the membership meeting.
- e) MOUG Liaison (Faulkner)
 - o Joint screencasts between OLAC and MOUG are on the [OLAC MOUG YouTube channel](#). A fuller report will be given at the membership meeting.
- f) SAC Liaison (Groenwald)
 - o LC is submitting the tentative LC Subject Headings Weekly Lists to SAC before the lists are made public. SAC responds and provides feedback to proposals and have been very helpful to LC.

Subcommittee, Coordinator Reports:

- g) NACO AV Funnel Coordinator (Lisius)
 - o Peter gave the OLAC workshop earlier in the day. There are a couple of participants who have moved institutions. Along with retirements, Peter is looking for new participants.
- h) Subcommittee for the Maintenance of Cataloging Policy Committee Resources (SMaCR) (Leigh) – No report.

Task Force Reports:

- i) [Unified Best Practices Task Force](#) (Barrett and Hutchinson) – Presented on progress. See appendix for full report.
- j) Joint MLA/OLAC Single Use Media Task Force (Evans) – Feedback from public comment period on OLAC-L and Troublesome Catalogers FB group
 - o Presented on progress, particularly about the community feedback period (June-July 2020). The committee received a lot of suggestions, including some concern of the term “single use.”
 - o The committee revised their name to “MLA/OLAC Media Devices Task Force.”
 - o The task force also asked for suggestions on the type of material they should focus on. From the suggestions and with the new name in mind, the committee married their focus to two categories of media. The two major categories are now (1) Digital media storage devices and (2) portable media devices.

5. New business (Whelan)

- a) Questions from the floor: Question on attending the OLAC membership meeting. A reminder, the membership meeting is Thursday at 11 a.m.
- b) Email us! Alex: aw3195@columbia.edu, Nariné: nb2296@columbia.edu

6. Adjourned at 4:50 pm EDT.

Appendix: OLAC Unified Best Practices Task Force

Report to CAPC, OLAC 2020 Conference

The OLAC Unified Best Practices Task Force continued to meet on a bi-weekly basis since the June 2020 CAPC Meeting. Since our last report, Josh Hutchinson has agreed to co-chair the task force with Marcia Barrett. The co-chairs are meeting bi-weekly to plan agenda items for Task Force biweekly meetings, and the addition of Josh’s leadership is helping us make consistent progress.

We have divided our work into three project phases -- integrate and align content from all current OLAC Cataloging Best Practices guides; learn the new RDA; and create OLAC cataloging policy statements and documents for the new RDA. This has been very helpful for planning purposes and accurately reflects the enormous scope of the charge for this Task Force.

Phase 1, Integrate/Align Content from Current OLAC Guides

Status: IN PROCESS

We have spent the majority of our time thus far on the first phase of the project -- integrating and aligning content from the current OLAC Cataloging Best Practices guides, with a focus on instructions and examples for RDA elements. Our current draft has undergone extensive scrutiny and discussion. Specifically, we have completed RDA chapters 1-4, with RDA chapters 6 and 7 next under review. We also have a draft Style Guide to complete before beginning the next draft, as well as integrating content from the current guides not directly related to instructions and examples for specific RDA elements such as definitions and general characteristics of the formats, tables of options for coded data, special situations, etc.

We expect the upcoming draft to be our penultimate draft for cataloging best practices using the current RDA. That draft will include integration of the content from *Best Practices for Cataloging Objects Using RDA and MARC 21* and proofreading and application of our style guide.

Some specific issues we have discussed extensively include:

Provider-Neutral Cataloging Guidelines

The Task Force recommends following Provider-Neutral Cataloging guidelines as a best practice; therefore, the instructions and examples in the guide reflect provider-neutral (PN) cataloging. PN cataloging does permit a few options for recording technical details, and the Task Force recommends recording technical details in MARC fields as authorized by both [OCLC Special Cataloging Guidelines for Provider-Neutral Cataloging of Online Resources](#) and [PCC Provider-Neutral E-Resource MARC Records Guidelines](#):

- **MARC field 588** for the Source of description note for born-digital resources
- **MARC field 856** for provider-specific URLs that do not contain institution-specific components such as proxy server data. The provider should be named in subfield 3.

There is a conflict between the guidelines regarding recording file type. OCLC Special Cataloging Guidelines for Provider-Neutral Cataloging of Online Resources do not permit recording file type in provider-neutral cataloging; however, the PCC Provider-Neutral E-Resource MARC Records Guidelines do authorize recording File type. Because file types for media are limited (audio file, data file), generic, and likely shared regardless of provider, the Task Force does recommend recording file type.

Example: 347 ## \$a audio file \$2 rdaft
 Streaming audio file

Finally, the Task Force recognizes that some libraries may want or need to record technical details. Therefore, the new unified guide will include an appendix laying out options for recording technical details as created and documented by the OLAC CAPC Streaming Media

RDA Guide Task Force in [Best Practices for Cataloging Streaming Media Using RDA and MARC21](#), Appendix C. The new guide will eliminate “Option 2, Recording technical details in a shared cataloging environment using the MARC21 format while NOT following the provider-neutral approach.”

Encoding Multiple Terms from the Same RDA Vocabulary

MARC21 Bibliographic documentation for [MARC21 field 344, Sound Characteristics](#) states “Multiple values from the same source vocabulary may be recorded in the same field in separate occurrences of subfields.”

Example: 344 ## \$g stereo \$g mono \$2 rdapc
 Disc-based video game with both mono and stereo sound tracks

OCLC Bibliographic Formats and Standards [MARC field 344, Sound Characteristics](#) guidelines differ: “Prefer use of a separate field for each unique term.”

Example: 344 ## \$g stereo \$2 rdapc
 344 ## \$g mono \$2 rdapc
 Disc-based video game with both mono and stereo sound tracks

The Task Force recommends following OCLC Policy and using separate MARC fields for each unique term to allow for future addition of URIs.

Authorized Access Points Related to Music

OLAC best practice guides have focused heavily on descriptive cataloging. Authorized access points in OLAC guides are also addressed, though perhaps not to the extent as instructions for descriptive cataloging. The depth of content related to access points differs among the current guides.

The Task Force is committed to retaining the rich content that exists in the current guides, and we do not want to overlap guidelines issued by the Music Library Association. When appropriate, we will refer users to MLA Best Practices. There are extensive instructions for authorized access points for music in the current streaming guide, and streaming media has not yet been addressed by MLA. We are in the process of reviewing this issue.

Phase 2, Learn the New RDA

Status: IN PROCESS

Six of the task force members are working through the ALA RDA Lab Series which runs weekly from June 2020 through December 2020. The exposure to sample application profiles and hands-on exercises have been very helpful. We are also aware of resources for tracking developments and status of the RDA Toolkit Restructure and Redesign (3R) Project such as the documents, presentations, and working group reports on the [RDA Steering Committee website](#)

and the LC-PCC Policy Statements Project for Beta RDA Toolkit Monthly reports on the [LC/PCC RDA Decisions, Policies, and Guidelines website](#). We are also aware of the [RDA Toolkit YouTube Channel](#), and some task force members have viewed some of the training videos.

Our current challenge with this phase of the project is finding time to familiarize ourselves with all of the current 3R resources while we are focused on completing the first phase of the project. Obviously, the task force will need to understand what is new and what has changed with the new RDA and how that will impact nonprint cataloging before we can begin the last phase of the project. Because current task force members have invested so much time in the project, we will assess members' willingness and ability to continue before moving to the third phase of the project.

Phase 3, Create OLAC Policy Statements and Documents for the New RDA

Status: DEFERRED UNTIL LC-PCC POLICY STATEMENTS ARE AVAILABLE

The third phase of the project has a dependency -- access to the LC/PCC Policy Statements for the new RDA Toolkit -- and the Task Force will need time to familiarize ourselves with the new policy statements. At that point, we will work on transforming content of the current unified OLAC cataloging best practices guide to align with the new RDA. We will identify and create needed policy statements. We expect to create an application profile in the new Toolkit, such as we've seen demonstrated throughout the RDA Lab Series workshops. As much of the value of OLAC Cataloging Guides lies in the rich narrative instructions and examples, we will also determine where links will need to be made from the new RDA Toolkit to the cataloging best practice guide published on the OLAC website. We intend to make the links from the Toolkit context-specific, so one can move from the Toolkit directly to the related section of the cataloging guide.

Submitted by the OLAC Unified Best Practices Task Force:

Marcia Barrett, co-chair
Melissa Burel
Josh Hutchinson, co-chair
Kyla Jemison
Ann Kardos

Teressa Keenan
Yoko Kudo
Julie Moore
Amanda Scott

Please send comments and questions to Marcia Barrett @ barrett@ucsc.edu and Josh Hutchinson at jchutchi@uci.edu.

From the Treasurer

Jennifer Eustis

Dear Members,

The Treasurer's report is longer than usual. You will find the Q1 report for FY20-21 and a midterm report for our Q2. The conference expenses span our Q1 and Q2 reports. The full Q2 financial report will appear in the next Newsletter. Here, I will address our financials from the Conference and then membership.



OLAC 2020 Conference:

First off, thank you to the Conference Planning Team that did an amazing job! I hope that you all enjoyed the conference. One aspect that the Conference Planning Team and Co-chairs recognized was the cost of an OLAC Conference. If you remember, each OLAC conference to date has required extra funding to cover the expenses of the conference. This is the first OLAC Conference where we were in the black. We were able to cover all of our expenses which included: Hotel cancellation fee when we switched from an in person to online conference, live captioning for almost all the sessions, workshop leaders' stipends, OLAC board member stipends, the fee for the preconference workshop presenter, and gifts from the games. We were happy to be able to offer several comped registrations for those who sought financial aid and our two OLAC Conference Scholarship winners. Beyond a shadow of a doubt, this year's conference was a financial success.

Membership:

As expected, membership grew thanks to the OLAC Conference. There was a 1.21% increase from the end of the first quarter. This is not as high as previous OLAC conferences. We will need to figure out how to retain our new members and avoid the downturn in membership that has occurred over the years.

Going Forward:

Content for Members: For the first time, we distributed the OLAC Newsletter to members first. We were able to gather statistics about this. As time goes on, we will continue this practice. Further, through our OLAC YouTube channel, we hope to bring you not only our membership meetings but other content.

Easier Registration: The registration for OLAC Conference was always geared towards an in-person meeting. With the shift to online, we kept that model. Going forward, we are suggesting to the OLAC Board easier ways for people to register. One is re-evaluating the Institutional Membership which always causes confusion. Second is to provide an easier way for groups to register. If you have ideas, please share email them with me at treasurer@olacinc.org.

Personal Membership	248
Institutional Memberships	23
Total as of 9/30/2020 (Q1)	271

	Opening Balance	1st Quarter	FY-to-Date
		\$ 16,202.13	\$ 16,202.13
INCOME			
Memberships		\$ 5,425.00	\$ 5,425.00
EBSCO Subscriptions		\$ -	\$ -
Conference Registrations		\$ 32,763.00	\$ 32,763.00
Donations		\$ 200.00	\$ 200.00
TOTAL INCOME		\$ 38,388.00	\$ 38,388.00
EXPENSES			
OLAC Conference			
Hotel		\$ 5,700.00	\$ 5,700.00
Facilities		\$ -	\$ -
Conference Stipends		\$ -	\$ -
Subtotal		\$ 5,700.00	\$ 5,700.00
Events			
Board Dinners		\$ -	\$ -
Facilities		\$ -	\$ -
Stipends		\$ 100.00	\$ 100.00
Subtotal		\$ 100.00	\$ 100.00
Vendors			
BlueHost		\$ -	\$ -
Affinipay		\$ 526.67	\$ 526.67
Wild Apricot		\$ -	\$ -
YNAB		\$ 50.00	\$ 50.00
Subtotal		\$ 576.67	\$ 576.67
Operations			
ALA Affiliate membership		\$ -	\$ -
Awards		\$ 111.37	\$ 111.37
Conference scholarships		\$ -	\$ -
Miscellaneous		\$ 25.00	\$ 25.00
Office supplies & postage		\$ -	\$ -
Overcharge adjustments		\$ -	\$ -
Research grant reimbursements		\$ -	\$ -
Subtotal		\$ 136.37	\$ 136.37
TOTAL EXPENSES		\$ 6,513.04	\$ 6,513.04
Closing Balance		\$ 48,077.09	\$ 48,077.09

Personal Membership	251
Institutional Memberships	23
Total as of 11/10/2020 (Q2)	274
Chase Bank Balance:	\$41,427.90

		2nd Quarter	FY-to-Date
	Opening Balance	\$ 48,077.09	
INCOME			
Memberships		\$ 505.00	\$ 5,930.00
EBSCO Subscriptions		\$ -	\$ -
Conference Registrations		\$ 1,405.00	\$ 32,763.00
Donations		\$ -	\$ 200.00
	TOTAL INCOME	\$ 505.00	\$ 38,893.00
EXPENSES			
OLAC Conference			
Hotel		\$ -	\$ -
Gifts		\$ 90.00	\$ 90.00
Assistive Technology		\$ 5,625.00	\$ 5,625.00
Facilities		\$ -	\$ -
Reimbursements		\$ -	\$ -
Stipends		\$ 1,900.00	\$ 1,900.00
	Subtotal	\$ 7,615.00	\$ 7,615.00
Events			
Board Dinners		\$ -	\$ -
Facilities		\$ -	\$ -
Reimbursements		\$ -	\$ -
Stipends		\$ 50.00	\$ 150.00
	Subtotal	\$ 50.00	\$ 150.00
Vendors			
BlueHost		\$ -	\$ -
Affinipay		\$ 794.19	\$ 1,320.86
Wild Apricot		\$ 972.00	\$ 972.00
YNAB		\$ -	\$ 50.00
	Subtotal	\$ 1,766.19	\$ 2,342.86
Operations			
ALA Affiliate membership		\$ -	\$ -
Awards		\$ -	\$ 111.37
Conference scholarships		\$ -	\$ -
Miscellaneous		\$ -	\$ -
Office supplies & postage		\$ -	\$ -
Overcharge adjustments		\$ -	\$ -
Research grant reimbursements		\$ -	\$ -
	Subtotal	\$ -	\$ 111.37
	TOTAL EXPENSES	\$ 9,381.19	\$ 10,069.23
	Closing Balance	\$ 39,200.90	

MOUG-OLAC Liaison Report

Autumn Faulkner

November 13, 2020

(updated from October 2020 report to OLAC)



As always, for those who are not aware, MOUG is the Music OCLC Users Group. Their special focus is the cataloging and discoverability of music resources as facilitated through OCLC, but they are a good group for general music cataloging guidance too. Many OLAC members are also members of MOUG, and vice versa. My job as liaison is to keep the membership of both groups informed about each other's work.

1. Conferences

- MOUG in-person conference took place February 2020
 - Conference presentations available on [MOUG 2020 conference website](#)
- 2021 virtual conference planned for February 22-24, 2021
 - The conference will be free of charge
 - Schedule and program TBA – watch MOUG listserv

2. Screencasts

- 3 new OLAC/MOUG screencasts are now available on the [OLAC/MOUG YouTube channel](#). These include:
 - Cataloging Cool Objects (Julie Moore)
 - Managing music technical services during a pandemic (Damien Iseminger)
 - Auto HotKey (Terry Simpkins)

3. Executive Board statement on recent events of racism and racially motivated violence

- Excerpt: “Within our organization and our profession we all CAN and WILL: amplify the voices of our members of color; do more to ensure our BIPOC (Black, Indigenous and People of Color) members experience a safe and welcoming environment; and do our level best to grow diversity, equity, and inclusion.”
- Full statement, “[About Recent Events](#)”, is on the MOUG website
- Watch for more discussion of potential updates to the MOUG mission statement and a new DEI statement as a way to “clarify MOUG’s identity and substantiate its intent,” as Chair Michelle Hahn notes in the September newsletter.

4. Elections and new officers

- New officer terms that begin in 2020
 - Heather Fisher, Secretary and Newsletter Editor
 - Kevin Kishimoto, Continuing Education Coordinator
- Election period closed in October 2020 for officer terms beginning in 2021; watch for news on MOUG-L
 - Vice Chair/Chair-Elect; Treasurer-Elect; Reference, Discovery, and Collection Coordinator

News and Announcements

Yoko Kudo, Column editor

Revised RDA Implementation Timeline: PCC Implementation Will Not Begin before July 2022

RDA beta Toolkit will be launched as the new RDA Toolkit on December 15, 2020. However, this is NOT the PCC implementation date for the new RDA. The implementation date for the PCC will NOT begin before July 2022. A timeline was drafted by the PCC Secretariat and agreed to by PoCo. This timeline is available from the PoCo meeting agenda posted [here](#).

Please note that PoCo is planning on a rolling implementation date beginning from the official PCC implementation start date (no earlier than July 2022). The timeline is subject to change as PCC strategic priorities evolve. Catalogers should continue to use the original RDA Toolkit (which will move to original.rdatoolkit.org on Dec. 15, 2020) and the LC-PCC Policy Statements for their current work. Please feel free to use the new RDA (which will then be available from access.rdatoolkit.org) for training and study but continue to use the original toolkit for PCC cataloging.

NACO 024 Moratorium End

The moratorium on adding 024 fields to NACO records is now over. Thanks to the efforts of the PCC URIs in MARC Pilot, [NACO best practice guidelines for the authority 024 field](#) have been created and posted to the [NACO website](#). The guidelines encourage considerable cataloger's judgment in assigning 024 fields in NACO records, and rely on PCC autonomy in working with this field. Examples are given for Persons, Corporate Names, Geographic Names, and Works/Expressions. The instruction sheet for the 024 field in DCM Z1 will be updated to reflect the end of the moratorium in the next Cataloger's Desktop release (2021 Issue 1, February 2021).

ARSC Conference 2021: Call for Presentations

The Association for Recorded Sound Collections invites proposals for presentations, posters and panels at its 55th annual conference, to be held virtually, May 13-15, 2021. We seek presentations and panels that are informative, display a passion for their subjects, and include compelling audiovisual content. Please share your special interests with our engaged community of collectors, historians, musicians, preservationists, archivists, and audio engineers. The deadline for proposals is January 4, 2021. Submit your proposal using [this form](#). For more information, visit the [ARSC website](#).

OCLC Cataloging Community Meeting, January 15, 2021

Please plan to join the OCLC Cataloging Community Meeting on 15 January, 2021 (Registration from [here](#)). During this online event, you will hear updates from several members of the cataloging community as well as from OCLC staff. There will be time to take questions you have at the end of the presentations. Additional details about the OCLC Cataloging Community Meeting – including speaker information and other details-- will be shared on the [new Cataloging and Metadata community](#) in coming weeks.

From the Outreach/Advocacy Coordinator

Ann Kardos

Wow! We are fresh off the successes of our first ever online conference and I just want to say that our members are the best! I truly enjoyed spending a few days with many of you in online conference sessions. Our conference planning committee planned an excellent conference while facing so many challenges. What a feat! I learned a lot and I hope you all did too.



On the home front, many of us have moved into darker and colder months. As I write these sentences to you now from Massachusetts, we are having a small snowstorm. While it is nice to be tucked away at home and watching the snowfall from my “office” window, it reminds me that we need to stand by each other more than ever. We are probably supporting ourselves and our colleagues in ways we did not imagine at the beginning of this year. It is possible that we are doing tasks we have not done in a while, or maybe ever, or that we are training colleagues to do things differently. Maybe folks are working with materials they have never handled before. This is where OLAC can help. We have guides and videos to provide cataloguing best practices on many non-print formats. You do not have to do those things alone!

But thinking ahead... I wish for all of us that we can move through the rest of 2020 and into 2021 with creativity and forgiveness. I will be creative in how I engage with my colleagues, friends and family. I will approach my job duties with creativity and curiosity and apply creative solutions when providing access to thousands of resources that support my campus community. But I will be forgiving in how I treat myself and others, and in my expectations for myself. Much gratitude to all of you in the OLAC community and may you have a healthy 2021.

If you have story ideas or OLAC anecdotes you would like to share with me, please feel free to reach out at annk@umass.edu.

Members on the Move: John DeSantis and Jen Bolmarcich

Ann Kardos, Column Editor

To celebrate the end of an unusual year, I wanted to focus on building relationships with individuals. I hope everyone enjoys meeting two of our members and hearing about their OLAC experiences. Thank you very much to John DeSantis and Jen Bolmarcich for participating!

John DeSantis

Long-time member, John DeSantis reflects on his OLAC story. I very briefly met John at my first OLAC conference in Richmond in 2017 (it was memorable for me because he and Bobby Bothmann were in costumes!). He is the Cataloging and Metadata Services Librarian at Dartmouth College in New Hampshire. I thought this would be a good chance to learn a little about a librarian whose name I often hear in OLAC circles, but whom I don't know at all. I love hearing different takes on what makes OLAC a good place to create a professional home.



AK: Tell us a little bit about yourself. When did you become a member of OLAC? What keeps you coming back?

JD: I began working as a librarian in 1992. It was a second career for me, although I did have experience as a cataloger before going to library school. I have been an OLAC member for 25 years; I believed I joined in 1995 when I was working at Amherst College. My supervisor had been a longtime member, had attended OLAC conferences and highly recommended the organization. The first conference I attended was the Charlotte conference in 1998, and I've attended all of them since then except for Seattle (2000) and Macon (2010). I didn't begin working with AV materials until 1996. Coincidentally my supervisor at Dartmouth at the time (and 24 years later she is still my supervisor) was active in OLAC in the early years and at one time was the newsletter editor! In the very early years I served a term on CAPC, which was my first experience with cataloging committees.

I keep coming back to OLAC primarily for the networking and the community of friends I've made at the conferences over the years, but also the information I learn in the workshops has always proved to be valuable in the work that I do.

When you meet cataloging and metadata professionals (or even new librarians) who are not OLAC members, what's your elevator pitch?

"Really? Oh wow, you should join. It's not terribly expensive. They do conferences every other year with really useful workshops. They also develop guidelines and practices for AV materials which may not be covered by the national standards, and they have their own cataloging committee which has reciprocal representation with the major ALA cataloging committees.

And their newsletter is legendary; it's a great source of information. It's a great group of people. I'd love to run into you at an OLAC conference some day!"

COVID-19 has made it so we cannot gather, but our members already do so much virtual work for the organization. As you think about past OLAC conferences and activities, what lessons do you hope we take away from our virtual conference experience in 2020?

The virtual conference was successful in delivering the information we would have received had the conference taken place in person, but the format made it difficult for the attendees to engage with each other. However, the experience also allowed members who are unable to attend regular OLAC conferences to participate. As technology for remote participation becomes easier to use with each passing year, OLAC could consider providing some level of virtual participation during its future in-person conferences.

What is your favorite OLAC memory?

So many wonderful memories—it would be hard to choose only one! I remember being very excited that two of my library school instructors, Lynne Howarth and Joe Cox, were speakers at the 1998 conference in Charlotte. I also fondly remember the highly entertaining NACO AV training with Ann Caldwell at the 2002 conference in St. Paul. The fabulous reception at the McCord Museum during the 2004 conference in Montreal. Presenting a poster session at the 2006 conference in Arizona. Heidi Lee Hoerman's delightful keynote address at the 2008 conference in Cleveland in which she predicted the demise of RDA. Taking the train up to Santa Fe with my friend Israel Yañez during the 2012 conference in Albuquerque. Seeing my friend Bobby Bothmann receive the Nancy B. Olson Award at the OLAC business meeting during the 2012 ALA conference in Anaheim. Seeing my friend Casey Mullin deliver the keynote address at the 2014 conference in Kansas City. And of course the traditional OLAC dinners during the IFLA conferences.

When you get to see your OLAC friends in person again, what do you want to do?

First of all, I want to give them all a big hug. But I would also want to plan outings for lunch, dinner, and cocktails. And take lots of pictures!

Jen Bolmarcich

Jen Bolmarcich is the Systems and Discovery Librarian at Hampshire College in Massachusetts. Jen is actually someone I'm getting to know more through a project happening in my consortium. We are both members of a team working to implement the new FOLIO Library Services Platform for the Five Colleges. I found out she had just become a brand new OLAC member and was excited to attend our first ever online conference. I reached out to Jen to discover what drew her to OLAC and to hear about her first impressions.



AK: What's your librarian background? What drew you to join OLAC and why did you choose our 2020 online conference?

JB: Librarianship is a second career for me; I worked in biotech after my undergrad for about 9 years. My data management experiences there prompted my original interest in getting my MLS. I did my degree part-time through Simmons University, at their Western Massachusetts [satellite] location at Mt. Holyoke College. I focused on archives and records management, with a side of digital libraries and metadata, and worked in a variety of public and academic libraries while I was in school.

My first professional position was as a project archivist focused on reprocessing and digitizing some large collections, and then I was lucky enough to be hired at Hampshire College. My role as Systems and Discovery Librarian involves e-resources and ILS management, and cataloging anything unusual or tricky.

My bibliographic cataloging training had been largely introductory, so I knew I needed support to learn how to manage AV, kits, games, and other odd things. I took a Library Juice Academy course on cataloging DVDs and Blu-ray, and we used OLAC's best practices document extensively. I joined to support that type of work, and because the conference program was exciting.

What's your favorite non-print format? If applicable: Was there anything unexpected that you learned or heard in one of the sessions?

My favorite non-print format is probably maps. I've always loved them as visual information, as well as aesthetically. I think the most unexpected thing I learned was in the Cataloging Funny Formats session, where we discussed using RDA to catalog an anti-slavery dessert service (a set of transferware dishes) – OCLC 1017991631!

COVID-19 has made it so we cannot gather, but OLAC already had a number of ways to engage virtually before all this--whether on task forces, working with the board, etc. What lessons do you hope we take away from our virtual conference experience in 2020?

The conference was really fabulously done. I was impressed with the live captioning, which was very well-done. Because the conference was virtual, I was able to attend (even outside the

pandemic and travel factors, my library doesn't have the funding to support much professional travel) and learn all sorts of new cataloging skills. The moderation and technical support for presenters was some of the best I've seen. Kudos to everyone involved. I think enabling virtual access even when events are held at a single location will be crucial for growing OLAC as an organization.

What message do you want to share with other new or potential OLAC members?

I've felt very welcomed into the community as a new cataloger, and the amount of education I got from a few days of sessions was incredible. I feel so much more comfortable tackling new materials and formats. I also know I can always reach out to the larger community; whether through the OLAC listserv or to individuals directly, as several presenters invited us to do.

What do you hope to bring to OLAC? What can we learn from you and other new members?

What can I teach? That's a great question. Perhaps I can offer some insight into the ways technical services positions and departments are changing (or being changed). Obviously these structural situations existed before the pandemic, though I'll add that starting a new position remotely can be very challenging! In general, needing to do more work with fewer staff is a regrettably common situation. In my case, I've replaced a full-time librarian and two professional staff. One result of losing local expertise is that on-the-job orientation and training is much harder to come by, as experienced staff retire or move on before new colleagues arrive.

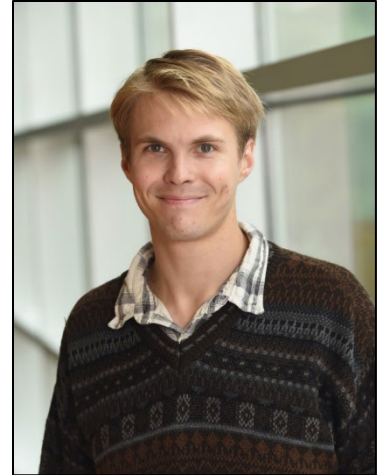
This is where organizations like OLAC can be incredibly valuable; the community's collective experience and willingness to mentor and teach new members may not exist within the library or other organization where we work. In addition, I also think that a lot of newer catalogers are in positions like mine, where cataloging isn't all we do. That makes educational resources even more important, because being able to review "how to do x" becomes more critical when you don't have the time to practice new skills on a regular basis.

I do hope that some of our expanded positions provide opportunities to improve communication and workflows across departmental or organizational lines, as well as across institutions. Much like e-resources and acquisitions groups have been able to organize against predatory pricing models, I think we have more power as a community than as individual institutions to influence vendors' metadata creation and quality control.

In the Spotlight with... Alex Whelan

Lisa Romano, Column Editor

Hello to Alex Whelan, who is the new Cataloging Policy Committee (CAPC) co-chair. Alex is currently the Time Based Media Metadata Librarian at Columbia University Libraries. His position was created a few years ago when Columbia planned a seven-year effort to digitize and catalog all of the library's audiovisual holdings. His work revolves around MARC cataloging for non-musical sound recordings such as oral histories and non-MARC metadata work for many types of audiovisual materials. What does Alex most enjoy about his job?



I really thrive on collaboration, particularly across departments. Cataloging jobs are individualistic, but the nature of my project is such that I am often working with people from multiple departments (curators, digitization, digital publishing) to see a recording through to public access. I think sometimes that's what project positions can really offer just by way of focus and scale.

The work across both MARC description and non-MARC metadata workflows can be challenging. Alex often has to bridge the divide between describing audiovisual items and then remediating that effort for access as a digital surrogate.

There's always a challenge of reconciling the physical relationship of audio carriers to the sequence in which a patron would actually want to consume the content. Thankfully, there's MODS metadata schema for that.

Plain and simple, Alex thinks that the most important part of cataloging and metadata is providing access.

I think providing access to the kinds of audiovisual materials I work with is especially enjoyable, not only because access and discoverability with time based media can often be hard-won, but it's very satisfying to be able to hear or see history itself once the material is finally able to be found.

Alex has discovered that the collections at the Columbia Center for Oral History are fascinating because of their diversity and their depth. Working with those collections often requires reading transcripts or listening to the digital recordings, so he accidentally has ended up with an in-depth knowledge of topics such as Black journalists in the mid-20th century. And the weirdest collection he has worked on?

Maybe the hundreds of hours dedicated to the inner workings of an industrial canning company!

Also at Columbia, Alex is involved with Diversity, Equity, and Inclusion (DEI) work at the libraries via the Columbia University Libraries Diversity & Inclusion Committee. He heads up a working group dedicated to examining collections and description across the libraries and working to make the experience of using their libraries as inclusive as possible.

Questions we pose to ourselves and our work include are people's identities being described accurately? Can members of our community find resources about themselves and their experiences? And when they do, will they feel represented and welcomed by what they find? It's challenging but extremely rewarding work.

How did it all begin? Alex's "career" started with his first library job as a 13-year-old shelving volunteer at the Pima County Library (Golf Links branch) in Tucson, Arizona. He caught the bug early! While Alex's path to becoming a librarian was definitely intentional, becoming a cataloger was accidental.

My early interest in books and organization were a natural fit for the library skill set, especially when I developed a deep interest in amateur and small-gauge independent filmmaking about 10 years ago. Those kinds of collections lend themselves very naturally to the discovery and championing of niche resources that I find so joyful about librarianship, because you're talking about materials that are either one-of-a-kind or relatively underrepresented in places where most people consume their media (online, streaming). Of course, once you become one of the people learning about all this stuff and how to help others connect to it, it's only a small step further towards reading up on cataloging practices!

Alex used his interest in filmmaking at his previous position at the Pratt Institute in Brooklyn. He was able to help establish a workflow for preserving 16mm prints for circulation/projection via cataloging policies and leveraging print condition information within the MARC records. Alex's work extended the lifespan and discoverability of thousands of 16mm film prints for classroom use, student use, and helped to uncover unique film materials via original cataloging.

An entire medium was essentially revived at Pratt for educational purposes!

Because of Alex's attraction to audiovisual materials, no wonder he was drawn towards OLAC! Alex first heard about OLAC through the CAPC meeting at his first annual ALA, 2018 in New Orleans.

I noticed that on Friday night there was a group who were so dedicated to non-print cataloging that they were going to start a meeting late into the evening when there was no competition. Turns out I was riveted, and here we are.

Alex first applied to be a CAPC member this year. After a general call for a CAPC chair over the summer, Alex volunteered and was appointed along with his co-chair Nariné Bournoutian.

And when asked if he had one piece of advice for new librarians, what would it be, Alex responded:

Even if takes a while, look for a job where you get to work with the kinds of collections or people that interest you most. You'll always have something to look forward to.

Update from OCLC Global Council

John DeSantis

Due to the ongoing pandemic, OCLC Global Council will continue to hold virtual meetings for the foreseeable future, including its annual meeting in Spring 2021.

The Council met virtually on November 12, where we launched the election cycle for 2021, approved the action plan, and discussed Global Council's current area of focus: the promotion of the Sustainable Development Goals. A survey on the SDGs is currently under way, and members of the library community are invited to take part in the survey before January 31, 2021. The survey can be accessed [here](#).

Immediately following the November Global Council meeting, delegates participated in a discussion on ways in which libraries are supporting racial and social justice.

Virtual elections were held in September 2020. The new Global Council Chair is Pilar Martinez (CEO of Edmonton Public Library in Alberta, Canada), and the new Vice-Chair is Earl Givens, Jr. (Library Director, Catawba College, North Carolina, USA). Pilar and Earl were also elected as Chair and Vice-Chair of the Americas Regional Council. Amendments to the Global Council by-laws were also approved during this election.

In July 2020 OCLC published a new research report: "Open Content Activities in Libraries: Same Direction, Different Trajectories—Findings from the 2018 OCLC Global Council Survey". The report can be accessed [here](#).

Call for Election Candidates!

We are seeking nominations for the offices of OLAC Vice President/President-Elect and OLAC Treasurer. Are you interested in a leadership opportunity where you will learn about the organization from the inside and help shape OLAC's future? Please consider nominating yourself! To become a candidate, any OLAC member can submit a letter of nomination indicating the position for which they wish to run. The letter should include a brief description of pertinent qualifications and professional activities.

All OLAC personal members are eligible to serve and self-nominations are highly encouraged. Not yet a member? Join now! Membership for one year is \$40. Feel free to contact incumbent officers for more information about OLAC or the positions below. If you would like to nominate a colleague, please be sure that person is willing to serve. The deadline for nominations is **December 31, 2020**. Please submit requested nomination materials in electronic form to Mary Huismann (huisma1@stolaf.edu).

OVERVIEW OF DUTIES

Vice President/President-Elect: This office is elected annually, with a term beginning in the summer following the ALA Annual Conference, and serves four years: a one-year term as Vice President/President-Elect, followed by one year as President, one year as Immediate Past-President, and one year as Past-Past President. The Vice President performs all duties delegated by the President and presides at meetings and other functions when the President cannot attend. The Vice President is expected to attend the OLAC and Executive Board Meetings while in office and is responsible for any OLAC sponsored programs held at ALA Annual. The Vice President chairs the OLAC Research Grant Committee.

The OLAC President presides at all OLAC Membership and Executive Board Meetings. The President will submit quarterly reports for the OLAC Newsletter, and works closely with the OLAC Executive Board in guiding the operations of the organization.

The Immediate Past President serves as Chair of the Nancy B. Olson Award Committee and as a member of the OLAC Executive Board. The Past President may also be assigned to take on additional projects.

The Past-Past President (adjunct to the Executive Board) serves as the Chair of the Elections Committee.

Treasurer: This office is elected every two years, with a term beginning in the summer following the ALA Annual Conference in the year elected. The next Treasurer's term will run from summer 2021 to summer 2023. The Treasurer has overall responsibility for the financial concerns of OLAC. Annually, the treasurer reviews the OLAC budget and assesses the financial health of the

organization. Written financial statements are presented at the OLAC Executive Board meetings. Quarterly statements are published in the newsletter. The Treasurer routinely handles inquiries including general information on OLAC, membership rates, and invoices. The Treasurer is also responsible for the duties enumerated in the OLAC Handbook and Bylaws.

For more information on the duties of elected officers, see the [OLAC Handbook](#).

Call for CAPC Members and Associate Members

OLAC's Cataloging Policy Committee (CAPC) is seeking applicants for full member and associate member positions with terms beginning after the 2021 ALA Annual Conference. Members serve two-year terms with possibility of reappointment to a second two-year term. Associate members serve one-year terms with possibility of reappointment to a second one-year term.

Member qualifications: Three years of current audiovisual cataloging experience or the equivalent; membership in OLAC; evidence of regular interaction with online cataloging systems or demonstrable knowledge of such systems. CAPC business is conducted during meetings at the ALA Midwinter and ALA Annual conferences and electronically between conferences. Candidates for full member positions must be willing to commit time and funds as necessary to attend one in-person meeting per year of their term.

Associate member qualifications: Interest in AV cataloging and willingness to assist with CAPC projects. CAPC business is conducted during meetings at the ALA Midwinter and ALA Annual conferences, and electronically between conferences. Candidates for appointment to CAPC associate member positions must be willing to commit time and funds as necessary to attend at least one of these in-person meetings per year.

Application Process

If you are interested in applying to be a CAPC member or associate member, please send a letter detailing your qualifications and your resume via e-mail to CAPC co-Chairs Nariné Bournoutian (nbournoutian@law.columbia.edu) and Alex Whelan (aw3195@columbia.edu) by January 31, 2021. Feel free to contact either of us with any questions you may have. Applications will be reviewed by CAPC co-chairs throughout February and approved by the OLAC Board in early March. All applicants will be notified of the Board's decisions.

News from OCLC

Jay Weitz, Column Editor

OCLC Products and Services Release Notes

Find the most current release notes for many OCLC products and services as well as links to data updates and to dynamic collection lists at https://help.oclc.org/Librarian_Toolbox/Release_notes. Included are CONTENTdm, EZproxy, Tipasa, WorldCat Discovery, WorldCat Knowledge Base, WorldCat Matching, WorldCat Validation, WorldShare Acquisitions, WorldShare Circulation, WorldShare Collection Evaluation, WorldShare Collection Manager, WorldShare Interlibrary Loan, WorldShare License Manager, WorldShare Record Manager, and WorldShare Reports.



General News

K. Wayne Smith, Former President and CEO of OCLC, Dies at 82

Dr. K. Wayne Smith, former President and CEO of OCLC, has died at the age of 82. Smith led OCLC from 1989–1998, a period of enormous growth. He came to OCLC after a distinguished career in government, education, and business. Smith taught in higher education, worked in national security at the highest levels of the U.S. federal government, and was a successful leader in the business world. He served as CEO at World Book Encyclopedia before coming to OCLC. Under Smith's leadership, OCLC increased its capacity to deliver innovative information services to libraries and their users. He led the creation of new services in electronic reference, electronic publishing, resource sharing, and training. He oversaw the introduction of FirstSearch as the first online end-user reference service and began making OCLC services available on the internet. He was a fierce advocate in support of research to expand the possibilities for library and information science. Smith led OCLC's move from largely a back-office computer service for library professionals doing cataloging and interlibrary loan work, to the reference desk, where libraries were using new OCLC core services designed for the patron, such as online reference and electronic publishing. During his tenure, OCLC introduced a variety of innovative services, including the EPIC and FirstSearch online reference services, Electronic Dewey, Electronic Journals Online, PromptCat, ILL Fee Management, OCLC Authority Control, and CatCD for Windows, to name a few. He also opened offices in Canada, Latin America, and the Caribbean.

From humble beginnings in his beloved hometown of Newton, North Carolina, K. Wayne Smith was a first-generation college student when he entered Wake Forest University, where he graduated summa cum laude with a degree in political science. He went on from Wake Forest to Princeton University on both a Woodrow Wilson Fellowship and a John Danforth Scholarship. He

taught at the United States Military Academy following his Princeton years. Smith worked in the Pentagon and in the White House, where he reported directly to the National Security Director Henry Kissinger. From there, he made the transition to business, first as managing partner at Coopers & Lybrand (now PWC), before serving as CEO at World Book and then OCLC. His devotion to Wake Forest University lasted a lifetime. He taught there following his retirement from business, was elected to the Wake Forest board of trustees in 1991 and named a Life Trustee in 2010. He served as chair of the board from 2007 to 2009 and chair of the Presidential Search Committee in 2005. He received Wake Forest's Distinguished Alumni Award in 1973 and the Medallion of Merit, the University's highest award for service, in 2011. The Smith family has endowed a scholarship—the Trinity Scholarship from K. Wayne Smith and Family—for academically gifted but financially resource-constrained students. He is survived by his wife of nearly 62 years, Audrey, and their son, Stuart. The family suggests, in lieu of flowers, memorial gifts or donations may be made to The Trinity Scholarship by K. Wayne Smith and Family c/o Wake Forest University, P.O. 7227, Winston-Salem, NC 27109.

WorldCat, Cataloging, and Metadata

WorldCat Matching, WorldCat Validation, and WorldShare Record Manager Updates

During the period from March through July 2020, OCLC installed a series of improvements, new features, and bug fixes to Duplicate Detection and Resolution (DDR) matching software and to Data Sync/Fingerprint matching software. Details of the changes are documented in the [WorldCat Matching Release Notes, August 2020](#), which were made available on 2020 August 20. On 2020 October 29, OCLC installed the most recent set of changes to WorldCat Validation, documented in the [WorldCat Validation Release Notes, October 2020](#). This release includes the new MARC Codes announced by the Library of Congress during September 2020, as well as several bug fixes to validation errors in some subfields \$w, \$0, and \$2. Finally, multiple enhancements and fixes to WorldShare Record Manager, installed during November 2020, are documented in the [WorldShare Record Manager Release Notes, November 2020](#).

How Your Library Will Benefit from Linked Data, by John Chapman

In January 2020, OCLC announced that the Andrew W. Mellon Foundation had awarded us a grant to build a shared entity management structure that supports libraries as we move toward new ways to create and share information about their collections. These new methods—commonly referred to as “linked data”—represent changes to both underlying library data and the type of activities that library workers perform. Even more importantly, they also signal a shift in how the library community can work together to build on each other’s work. I believe that no matter what type of library you are associated with, you and your users will benefit from this project.

A six-month checkpoint. In a [recent post](#), we talked about [Project Passage](#), which offered insights into some new interfaces and systems for librarians to create linked data. But those aren't the whole story. We asked participants about what large data providers, such as OCLC, would need to do in order to make these systems work for real. As OCLC's past, present, and future are deeply intertwined with the notion of shared cataloging, I thought a six-month checkpoint for this new grant would provide a good time to talk about what our work here means for you and your library. When operationalized, linked data will provide participating libraries with:

- A massive collection of descriptive information and identifiers for creative works, persons, and other things libraries need to refer to.
- The capability to enhance these descriptions or add them for things missing from the collection.
- An ecosystem (including a lightweight UI and APIs) that will allow library workers to create linked data natively, instead of through conversion from MARC.
- Tools to reconcile local library metadata with that of the ecosystem and connect library metadata with nonlibrary sources.

It will also seed the web with identifiers that are meaningful to both library users and workers. We'll be creating and publishing data on many millions of creative works, and persons associated with them—providing critical links for both describing and discovering our collections. By referring to these creative works and persons using consistent identifiers, applications will be able to make connections across disparate or diffuse collections.

A quick start. After hearing in late December 2019 about the impending grant award, we assembled a technical team and got to work. By the time the announcement was published on 2020 January 9, this core team had already set up the technical tools and environments to begin development. OCLC is contributing a substantial amount of staff time and dollars to the project, essentially matching the Mellon award and allowing us to integrate the work into many other existing processes. Our team is addressing each of the items above during the grant process, with a particular focus on providing linked metadata “at the point of need,” during the creation process. By making lookups faster and reducing the cycle time of traditional authority work, the project will make it easier and faster to include linked data Uniform Resource Identifiers (URIs) in all types of metadata. That means no matter what type of metadata work you are doing—traditional MARC-based cataloging, a mix of Dublin Core and local terms in your digital repository, or full-on BIBFRAME—you will be able to make use of these identifiers. And as other libraries start to use them, providing your users context and additional content will be easier than ever.

Team efforts. Given the length of the project—this is a two-year grant, wrapping up in December 2021—we knew it was important to keep lines of communication libraries open. The field of linked data is rapidly evolving, and we want to make sure that at the end of the project we are meeting expectations and advancing the field. In June 2020, we welcomed more libraries to our Entity Management Advisory Group, which is the primary setting for conversations about the

project. Twenty-five libraries from seven countries currently participate through online discussions and in monthly meetings. So far, the topics have included APIs, UX Research, and data modeling. We have continued and intensified our partnership with the Linked Data for Production (LD4P) project, also funded by Mellon, and with the Program for Cooperative Cataloging (PCC), who have made linked data and concepts of “identity management” a core part of their strategy. In order to more successfully meet library workers’ needs, the User Experience Research staff at OCLC have also held focused interviews with dozens of librarians in order to shed light on the challenges and concerns around working with these new concepts in real-life workflows.

A first milestone ... with more to come. There are other types of input that can be gathered only from users looking at and interacting with data and data tools. To that end, we recently offered a first look at the work we have been doing to a select set of libraries from the Advisory Group. This testing is the first of three preliminary checkpoints before the final, official release in December 2021. Libraries will be able to review data assembled for more than one million creative works and persons associated with their creation and subject matter. They will also be able to make use of both a simple user interface and a set of APIs. While these tests are for a very early, limited set of functionality that we are already working to surpass, they are an important step for this critical project. Linked data represents a way to dramatically increase the utility of library metadata for those of us who work in libraries and for our users. It’s also a way to increase our ability to partner with outside organizations that have data we can use productively, and that value the kinds of work we do. This significant step into operationalizing linked data and creating a shared infrastructure for the community is truly exciting for us here at OCLC, the libraries working with us, and partner organizations like the Mellon Foundation. I look forward to sharing more information about the project later this year. For a look at recent developments, please see the recording of our 2020 July 29 webinar, “[OCLC and Linked Data: Moving from Research to Reality](#).” The event featured speakers from OCLC and Temple University who discussed the CONTENTdm linked data project and the shared entity management infrastructure project.

OCLC Signs Agreements with Publishers and Other Content Providers Worldwide

OCLC has signed agreements with leading publishers and other [content providers](#) around the world to add metadata for high-quality electronic and print books, journals, databases, and other learning materials that will make their content discoverable through [WorldCat Discovery](#). OCLC has agreements in place with more than 400 publishers, aggregators, and other content providers to supply metadata to facilitate discovery and access to key resources. OCLC recently signed agreements with the following providers:

- [American Institute of Aeronautics and Astronautics \(AIAA\)](#), based in Reston, Virginia, USA, is the world’s largest technical society dedicated to the global aerospace

profession. The AIAA has nearly 30,000 individual members from 91 countries and 95 corporate members.

- [Browns Books for Students](#), based in Hull, UK, is the UK's leading supplier of books, ebooks, and DVDs for schools, colleges, universities, and businesses.
- [BuildingGreen, Inc.](#), based in Brattleboro, Vermont, USA, helps architects, designers, and other sustainability professionals make their projects greener and healthier.
- [Catholic Research Resources Alliance](#), based in Albany, New York, USA, is a membership alliance of institutions collaborating to deliver projects and services in support of its mission "to provide enduring global access to Catholic research resources in the Americas." Its immediate focus is creating access to those rare, unique, and uncommon research materials that are held by libraries and archives in North America.
- [DIS Magazine](#), based in New York, New York, USA, is a virtual platform that examines art, fashion, music, and culture, constructing and supporting new creative practices.
- The [Economist Intelligence Unit](#), based in London, UK, is the research and analysis division of The Economist Group, the sister company to *The Economist* newspaper. It has more than 70 years of experience in helping businesses, financial firms, and governments navigate the ever-changing global landscape.
- [Éditions L'Harmattan](#), based in Paris, France, is an independent publishing house around universal values of human rights. Its ambition is to share knowledge and contribute to the emergence of French-speaking authors.
- [EDP Sciences](#), based in Les Ulis, France, is dedicated to publishing high-quality research and content in the fields of physics, astrophysics, humanities, mathematics, engineering sciences, life sciences, and medicine. Today, EDP Sciences publishes scientific journals, books, and conference proceedings.
- Giuffrè Francis Lefebvre, based in Milan, Italy, is a division within the multinational group Editions Lefebvre Sarrut, one of the world leaders in the professional publishing market, specializing in law and tax content.
- [Human Kinetics](#), based in Champaign, Illinois, USA, publishes more than 25 peer-reviewed publications to provide quality, cutting-edge information for use by professors, teachers, researchers, practitioners, health care professionals, coaches, fitness enthusiasts, and many others.
- [Kortext](#), based in Bournemouth, UK, is a leader in delivering digital content under flexible access models that work for universities and students. Access can be from the library OPAC, through the learning management system, discovery portals, or reading lists.
- [Massachusetts Medical Society](#), based in Waltham, Massachusetts, USA, is under the auspices of the [NEJM Group](#). The Massachusetts Medical Society extends its mission globally by advancing medical knowledge from research to patient care through the [New England Journal of Medicine](#).
- [National Bureau of Economic Research \(NBER\)](#), based in Cambridge, Massachusetts, USA, is a private, non-profit, non-partisan organization dedicated to conducting economic research and to disseminating research findings among academics, public policy makers, and business professionals.

- [O'Reilly Media](#), based in Sebastopol, California, USA, delivers highly topical and comprehensive technology and business learning solutions to millions of users across enterprise, consumer, and university channels.
- [Publications Office of the European Union](#), based in Luxembourg, is an inter-institutional office whose task is to publish the publications of the institutions of the European Union.
- [Répertoire International de Littérature Musicale \(RILM\)](#), based in New York, New York, USA, documents and disseminates music research worldwide through a number of online resources.
- [The Royal Society](#), based in London, UK, is [the independent scientific academy of the UK, dedicated to promoting excellence in science for the benefit of humanity](#). The Royal Society is a fellowship of many of the world's most eminent scientists and is the oldest scientific academy in continuous existence. It publishes international, peer-reviewed scientific journals.
- [Trans Tech Publications](#), based in Baech, Switzerland, publishes academic content in the areas of engineering and science. The editorial and publishing processes are supported by its own online management and publishing system integrated into the Scientific.Net website.
- [UCBooks](#), based in Amsterdam, the Netherlands, provides a white-label platform that enables members of library institutions to buy, sell, or lend books and access library content.
- [University of Michigan Press](#), based in Ann Arbor, Michigan, USA, publishes scholarly content in a wide range of humanities and social science disciplines championing the university's teaching and learning mission.
- [utb GmbH](#), based in Stuttgart, Germany, is a group of 16 academic publishers in Germany, Austria and Switzerland, founded 50 years ago. The group co-operates in university textbook publishing under the label utb in more than 30 disciplines, including German language and literature, theology, philosophy, economics, and law.
- [vLex](#), based in Miami, Florida, USA, hosts an extensive online library of books and journals with content from more than 1,000 publishers in the areas of comprehensive statutes and case law.
- [Wolters Kluwer Legal Education](#), is part of Wolters Kluwer Legal & Regulatory, U.S., a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. Wolters Kluwer Legal Education helps its customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with advanced technology and services.
- [Yale University Press](#), based in New Haven, Connecticut, USA, publishes scholarly works from a multitude of disciplines. Its aim is to contribute to global understanding of human affairs and to aid in the discovery and dissemination of light and truth, lux et veritas, which is a central purpose of Yale University.

Metadata from many of these content providers will also be made available to users through other OCLC services, including WorldCat.org, 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, these partnerships help libraries represent their electronic and physical collections more completely and efficiently. More about WorldCat Discovery and [OCLC partnerships](#) is on the OCLC website.

Resource Sharing

OCLC Supports Libraries, Researchers, Educators, and Students with Open Access Content Through WorldCat

OCLC is supporting libraries, researchers, educators, and students with high-quality open access content that is discoverable and freely accessible through [WorldCat Discovery](#) and [WorldCat.org](#). OCLC is making open content more discoverable and accessible through expanding collections and user-friendly discovery services. The [Open Library of Humanities](#) (OLH) is a charitable organization dedicated to publishing open access scholarship with no author-facing article processing charges (APCs). OLH publishes 28 peer-reviewed journals and is funded by an international consortium of almost 300 libraries committed to the mission of making scholarly publishing fairer, more accessible, and rigorously preserved for the digital future. OLH won several awards, including the 2020 [AOP Small Digital Publisher of the Year](#) award, the Coko Open Publishing Award from 2019, and a high commendation from the [ALPSP Award for Innovation in Publishing](#) 2020. Open access content, including open educational resources, can provide faculties and students much needed scholarly information online while they are teaching and learning remotely, especially during the pandemic. The [Open Education Network \(OEN\)](#) is based at the Center for Open Education in the University of Minnesota's College of Education and Human Development. The OEN community includes more than 1,200 campuses. Together they develop shared strategies for building open education programs and support the [Open Textbook Library](#), a comprehensive resource for openly licensed academic textbooks. The library currently includes more than 800 textbooks which cover a range of key subject areas including Business, Law, Medicine, and Social Sciences; all are free, and the majority are peer reviewed. A variety of open access content is currently available through WorldCat, both from traditional publishers as well as from leading open access providers, including:

- [Directory of Open Access Books](#)
- [Directory of Open Access Journals](#)
- [HathiTrust](#)
- [Knowledge Unlatched](#)
- [Open Access Publishing in European Networks](#)
- [OAISTER](#)
- [Open Book Publishers](#)
- [OpenEdition](#)
- [Open Textbook Library](#)

- [Paperity](#)
- [Persée](#)
- [PLOS](#)
- [Project Gutenberg](#)
- [SciELO \(The Scientific Online Library\)](#)

OCLC partners with more than 400 publishers and content providers to proactively obtain bibliographic records with holdings attached. This ensures that library collections are kept up to date—critical for rapidly changing e-titles and e-collections. OCLC brings the power of the world’s largest library cooperative to support open access initiatives at scale. For publishers and content providers, OCLC brings visibility to open content. For libraries and their users, OCLC helps prioritize open collections for optimal discovery and access. More about OCLC’s [open access initiatives](#) is on the website.

Search Expansion Makes Finding Related Resources Easier

Much of discovery begins with an idea of what topics and resources are desired for research. But in many cases, researchers don’t know what they don’t know. This is where a smart discovery system can save the day. In WorldCat Discovery, we’ve been focusing on making discovery an enjoyable and serendipitous journey toward knowledge. This requires working with data in innovative ways to surface not only resources the user thinks she/he wants, but also resources that she/he didn’t understand were related (and therefore potentially beneficial). WorldCat Discovery users have access to more than 4 billion resources through WorldCat and a robust central index of content. To help make sense of such a massive amount of data, we’re building intuitive solutions that promote efficient, effective, and delightful discovery experiences. In April 2020 we released an enhancement that enables searching across authority files—including MeSH, LCSH, RVM, and others—to find relevant search terms, even when using related, variant, or deprecated search terms. While librarians have been adding authority file data for many years, this enhancement is the first to purposefully and effectively leverage that information to add value to search results. Say, for example, a pre-med student is developing a report on heart attack trends. Naturally, the student begins with a search for “heart attack”. When the search expansion feature is enabled, the user will also see results that include “myocardial infarction”. This simple change in search parameters can unlock a wealth of relevant resources. In keeping with customization through configuration, WorldCat Discovery libraries can enable this enhancement in Service Configuration. Within the search expansion settings, users can also select which authority files to utilize when expanding users’ queries, and researchers also have the ability to enable/disable the feature directly in the user interface. Community engagement has always been central to our efforts as a global cooperative. In the WorldCat Discovery Community, we have additional opportunities to share, discuss, and provide feedback, including a new, short survey regarding your experience with the search expansion enhancement. We thank you for your contributions to the WorldCat Discovery service and the OCLC cooperative.

Moving Forward Together: Highlights from RSC20

Every year, the entire OCLC Resource Sharing Team looks forward to the Resource Sharing Conference (RSC). It's a unique opportunity for us all to connect with you—a dedicated and knowledgeable community of ILL professionals. We know how important it is for you all to connect with each other as well. Even though we couldn't come together in person this year, the Program Committee and the speakers, who graciously agreed to participate in a new virtual format, made the RSC20 web series *Moving forward together* a great success. More than 1,200 attendees from 800 institutions in 9 countries came together virtually over the course of the series to hear from 13 community speakers. So while we missed being with you in person and developing deeper relationships, the silver lining was that many more of you—from libraries worldwide—were able to attend virtually. If you missed any of the sessions, we encourage you to visit oclc.org/rsc20-links to access the recordings and accompanying slides. (Note: To access the RSC20 recordings, you'll need to sign into the OCLC Community Center with your credentials for WorldShare ILL or Tipasa. If you don't know your Community Center credentials, reference the [OCLC Support website](#) or [contact OCLC Support](#). And if you don't have Community Center credentials, you may [request them here](#).) In addition to the recordings, you can access the slides for other presentations that were scheduled for the in-person conference but not included in the virtual series. Going forward, we'll continue to offer opportunities for you to share and learn with the ILL community. In the five-part RSC20 series, the speakers covered topics that were originally planned but with additional insights that were timely and tailored to these challenging times. These topics also had some of the highest registration numbers leading up to the in-person event. Thanks to the presenters for ensuring the sessions were relevant and included takeaways to apply now and in the future. Thank you again to all the speakers for participating and sharing. Thank you to the [Programming Committee](#) for staying with us through all the ups and downs. Most of all, thank you all for attending. As we continue to move forward together, keep a watch on Community News for details on upcoming events and RSC21.

Delivery Services

Tips for Reopening Your ILL Service

If your library is one of many that are resuming more normal ILL operations, or you're just planning to restart lending and borrowing, here are some workflow and configuration suggestions to help make the transition smooth. These tips cover both lending and borrowing physical materials for libraries using WorldShare Interlibrary Loan, Tipasa, and ILLiad, as well as a reminder about copy requests. [Click here for the tips](#). We hope these tips will help you with restarting your ILL service. As always, please reach out to [OCLC Support](#) if you need any assistance from your Resource Sharing Team.

Management Services

Québec Universities Now Using OCLC's WMS to Share, Search BCI Library Collections

Québec university libraries that are grouped together within the library Subcommittee of the Bureau de coopération interuniversitaire (BCI) are now managing, sharing, and searching their collections through a single union catalog built on OCLC's WorldShare Management Services library services platform. The Québec university library partnership (QUL) has created a union catalog for the entire Québec university community with the help of BCI and OCLC. The WorldShare platform makes it possible for the libraries to expand cooperation among QUL, and enhance the user experience through an expanded, merged union catalog accessible through a bilingual search interface. Students and faculty from the Québec universities are now able to search the collections of all 18 libraries through a single search tool, [Sofia](#). The new Sofia search capability makes it easy to locate documents among the collections of Québec university libraries in real time, showing which institutions hold the document, in which languages, and allows requests for the documents to be made within Sofia, while complying with user licenses of each institution. [WorldShare Management Services](#) (WMS) is a cloud-based library services platform with [WorldCat](#) as its foundation, which allows library staff to draw on the collaborative data and work of libraries worldwide for more efficient workflows. WMS also enables staff to better manage resources in all formats and to provide their users with improved access to the library's collections and the world's knowledge. The WMS library services platform for the Québec university library partnership has been live since summer of 2020 in advance of fall classes.

Bucks County Free Library to Make Strategic Plan a Reality with Help from OCLC Wise

[Bucks County Free Library](#), in Bucks County, Pennsylvania, is the first consortium to sign on to implement [OCLC Wise](#), the first community engagement system for U.S. public libraries. Wise is a holistic system that takes community engagement and collection management to a new level by combining the power of customer relationship management, marketing, and analytics with integrated library system (ILS) functionality, such as circulation and acquisitions. Wise is different; it's designed around people, not the collection. It supports libraries' continued shift into dynamic centers of activity and expands the impact libraries have on their communities. The Bucks County Free Library (BCFL) is a seven-branch county library system with locations in Bensalem, Doylestown, Langhorne, Levittown, Perkasie, Quakertown, and Yardley-Makefield. As part of its strategic plan, BCFL has committed to "continuously evolve in ways that track the pace of new technologies and individual preferences for access to information." Wise will help BCFL make that plan a reality. One of the features of the Wise system is that it evolves collections to reflect the preferences not only of the entire library community, but also at an individual branch level. For example, if there is high demand for materials about gardening at one location and a greater need for children's books at another, the system helps optimize the collection over time to reflect those differences. Learn more about Wise at [oc.lc/wise](#).

Member Relations, Advocacy, Governance, and Training

REALM Project Releases Results from Latest Tests of Coronavirus on Leather, Summary of Research

The [REALM project](#) has released results from the latest round of scientific tests to determine how long the SARS-CoV-2 virus that causes COVID-19 can remain on materials found in archives, libraries, and museums, along with a summary of published research to help inform these institutions as they reopen to the public. New lab test findings from Battelle show that the infectious virus survived through eight days on both natural leather and synthetic leather fabrics. (See [Test 5 results](#).) The project also made available a compilation of SARS-CoV-2 scientific research published through mid-August 2020, which summarizes current research on how the virus spreads, its survival on materials and surfaces, and the effectiveness of various prevention and decontamination measures. The new research review highlights growing evidence that direct contact and respiratory droplets appear to be the primary modes of spread, and that aerosols may be a contributor to infection. The summary of relevant research also underscores the fact that there remain some critical "known unknowns" about the COVID-19 virus, including how much virus is needed to infect someone, how much virus an infected person sheds, and whether people are getting infected by touching objects and surfaces. (Read the [research summary](#).)

The REOpening Archives, Libraries, and Museums (REALM) project is designed to generate scientific information to support the handling of core library, museum, and archival materials as these institutions begin to resume operations and reopen to the public. The project is supported by the Institute of Museum and Library Services (IMLS), the primary source of federal funding for museums and libraries; and OCLC, a nonprofit library technology and research organization; in partnership with Battelle, a not-for-profit global scientific research and development organization. Project updates are posted at oclc.org/realm-project as they become available. Those interested can also [sign up](#) through the project website to receive timely email updates when new information is released.

Anja Smit, Shirley Chiu-wing Wong Take Seats on OCLC Board of Trustees

Anja Smit, University Librarian at Utrecht University in Utrecht, Netherlands, and Shirley Chiu-wing Wong, University Librarian at The Hong Kong Polytechnic University, took their seats on the OCLC Board of Trustees on 2020 November 9 during the board's regular November meeting. Both were elected by OCLC Global Council to serve four-year terms on the board. There are currently nine librarians from five countries serving on the 15-member OCLC Board of Trustees.

- After an international career of over 30 years in library management and library automation, Anja Smit joined Utrecht University in 2010 as University Librarian. In 2018, she initiated an Open Science Program in her University. Previously, she has served as a University Librarian at the Radboud University and Maastricht University and worked

with Academic Libraries in the United States as an Executive Consultant. Smit is active in national and international networks, including the Dutch Consortium Library Consortium UKB, the LIBER Board, and LERU INFO group. In addition to her work for Utrecht University, she is chair of the Board of the Public Library South East Utrecht and a member of the Board of the Utrecht Archive on behalf of the National Government. She served on OCLC Global Council beginning in 2010, was elected Vice-President/President Elect of Global Council in 2014 and served as President in 2015-2016. Smit holds an MA from Utrecht University in Dutch Literature.

- Dr. Shirley Chiu-wing Wong has served as University Librarian of The Hong Kong Polytechnic University (PolyU) since 2012. Before that, she served at The Chinese University of Hong Kong Library where she was responsible for library user services, mandatory information literacy assessment, the library extension project, and the development of learning commons and research commons. Wong was the principal investigator of the three-year project funded by the Hong Kong University Grants Committee (UGC) and involved all eight UGC-funded universities to enhance information literacy among university students by developing and implementing the InfoLit for U MOOC, launched in 2018. In Hong Kong, Wong was Chair of the Joint University Librarians Advisory Committee (JULAC) in 2016-2017, Chair of the JULAC Learning Strategies Committee in 2012-2020, Chair of the JULAC Copyright Committee in 2008-2012, Chair of the JULAC Committee on Reference Services in 2005-2007, and Secretary to and member of the then Heads of Universities Committee Task Force on Copyright in Education in 2005-2012. Internationally, Wong was Chair of OCLC Asia Pacific Regional Council in 2018-2019, a board member of IATUL in 2014-2017, and a member of the Copyright and Other Legal Matters Committee of IFLA in 2009-2017. Wong obtained her Bachelor of Science, Postgraduate Certificate in Education (with Distinction) and Advanced Diploma in Education (Psychology of Student Learning) from The University of Hong Kong. She was awarded an overseas postgraduate scholarship for pursuing an MA in Library and Information Studies at University College London, and she received her doctoral degree in education from The Chinese University of Hong Kong.

Smit and Wong will replace Madeleine Lefebvre, Chief Librarian Emerita, Ryerson University, and Jacques Malschaert, Owner/CEO, Malschaert Project Bureau BV, who were both elected by Global Council in 2016 and served four-year terms on the Board. The [OCLC Global Council](#) is elected by OCLC members to represent the global library community. They provide reflection and insights regarding the needs and issues facing modern libraries. They also elect members to the OCLC Board of Trustees.

Transforming School Library Practice in Small Schools

OCLC is serving as a mentor organization for a second cohort of five small, rural U.S. school libraries that are participating in the Institute of Museum and Library Service's (IMLS)

[Accelerating Promising Practices for Small Libraries](#) (APP) initiative. The mentorship, which began in September 2020, is scheduled to span over two years. OCLC is also continuing to mentor a [first APP cohort](#) of ten school libraries that initiated in September 2019. As a mentor organization, OCLC is supporting each cohort with a facilitated community of practice hosted by WebJunction, three multi-day convenings (in-person or virtual), training, technical assistance, and coaching as the grantees transform their school library's practice to better serve their communities. Individual grantee projects are redesigning their libraries for 21st-century learning, advancing staff skills, strengthening partnerships with stakeholders, and enhancing programs and services that will prepare their students for success. OCLC is using a discovery process to "meet grantees where they are" and support both individual and cohort needs as they strengthen the role of their libraries as dynamic learning centers. For more information about the participating school libraries and their projects, see [Transforming School Library Practice Grantees](#).

Round 2 school library grantees:

- Brooklyn Center Community School District, Brooklyn Center, Minnesota
- CeDin Laboratory School, Marginal Avenida Lomas Verdes, San Juan, Puerto Rico
- Hominy Public Schools, Hominy, Oklahoma
- North Middle School, Great Falls, Montana
- Wahluke High School, Mattawa, Washington

Round 1 school library grantees:

- Aurora Public School East Side District #131, Aurora, Illinois
- Fort Benton Schools School District 1, Benton, Montana
- Freedom Public School, Freedom, Oklahoma
- Hillsboro-Deering School District, Hillsborough, New Hampshire
- Laurens County School District 55, Laurens, South Carolina
- Milford Central School District, Milford, New York
- Orleans Central Supervisory Union, Barton, Vermont
- Osage Hills Public School District (Osage County Interlocal Cooperative), Bartlesville, Oklahoma
- Regional School Unit 63, Holden, Maine
- Worcester County Public Schools (Board of Education of Worcester County), Newark, Maryland

OCLC is one of three mentor organizations selected to support the IMLS APP initiative; Wisconsin Library Services and Kansas City Public Library are also serving as mentor organizations in separate grant categories. For the IMLS press release announcing the first round of the APP initiative, [click here](#). *The APP Transforming School Library Practice Mentorship Program is made possible by support from OCLC and the [Institute of Museum and Library Services](#) (project number LG-00-19-0289-19).*

Lorcan Dempsey Presents “Pandemic Effects and Collection Directions” at RLUK Digital Shift Forum

On 2020 October 30, Lorcan Dempsey, OCLC Vice President and Chief Strategist, presented at [RLUK’s Digital Shift Forum](#) to consider how the COVID-19 pandemic is accelerating library trends and directions that could have long-term effects on library collections and services. This was the opening presentation for RLUK's Digital Shift Forum, which brings together colleagues from across the information, research, cultural and heritage communities, and third and commercial sectors, to discuss the future of the digital shift in collections, services, and audiences. OCLC is pleased to have helped kick off this series of discussions to help further conversation around RLUK’s [manifesto for the digital shift in research libraries](#). Watch his presentation “[Pandemic effects and collection directions](#)”.

New Report Out Now: Transitioning to the Next Generation of Metadata

Transitioning to the Next Generation of Metadata, an OCLC Research Report by Karen Smith-Yoshimura, synthesizes six years (2015-2020) of OCLC Research Library Partners Metadata Managers Focus Group discussions to trace how metadata services are changing into the “next generation of metadata” and the impact on future metadata services and staffing requirements. This report considers:

- Why is metadata changing?
- How is the creation process changing?
- How is the metadata itself changing?
- What impact will these changes have on future staffing requirements, and how can libraries prepare?

Download the free report at <https://oc.lc/nextgen-metadata-report>.

OCLC and LIBER Announce Joint Discussion Series on Open Science

[OCLC](#) and [LIBER](#) announced the launch of a discussion series on Open Science through webinars and discussion groups from 2020 September 24 through November 5. The [series](#), based on the [LIBER Open Science Roadmap](#), will help guide research libraries in envisioning the support infrastructure for Open Science (OS) and their role at local, national, and global levels. The series starts with an introductory webinar delivered by LIBER, providing an overview of the Roadmap. This will be followed by interactive group discussions covering scholarly publishing, FAIR data, research infrastructures and the EOSC, metrics & rewards, open science skills, research integrity and citizen science, taking place throughout October. The aim, to collectively explore a vision and path forward for the future role of libraries in each of the Roadmap focus areas. The series will conclude with a wrap-up webinar on 5 November. Separate registration will be required for each event, and numbers are strictly limited. For further information, see the [OCLC-LIBER Open Science Discussion Series](#).

OLAC Cataloger's Judgment: *Questions and Answers*

Jay Weitz, Column Editor

Doing What Comes Naturally

Question: How do the rules of “when to create a new record” apply to naturally occurring objects?

Answer: With naturally occurring objects, you have to use judgment regarding whether to create new records. Each one is unique, so if you can distinguish one from another in some bibliographically significant manner, by all means create a new record. Keep in mind the notion of “[Cataloging Defensively](#)”, using the cataloging instructions and MARC 21 to legitimately distinguish one naturally occurring object from other similar ones. If the objects are not bibliographically distinguishable, however, local edits of an existing record may be the more prudent approach.

Unreliable Narrators

Question: Weren't rules changed so that both seen and unseen narrators are put in field 511 and not unseen narrators only in 508?

Answer: The on-screen/off-screen narrator issue dates back at least to AACR2, if I remember correctly, but no longer applies. It was formally rescinded with some simplifications resulting from the April 2015 Update to RDA. The instructions regarding Statements of Responsibility were significantly streamlined, with much more being left to cataloger's judgment. This is mostly thanks to a joint CC:DA task group of OLAC and the Music Library Association that tried to rationalize some complex instructions in RDA 2.4 (Statement of Responsibility), RDA 7.23 (Performer, Narrator, and/or Presenter), and RDA 7.24 (Artistic and/or Technical Credit). The instructions in RDA 7.23 and 7.24 were essentially deprecated in favor of references back to RDA 2.4 and 2.17.3 for Statements of Responsibility and forward to RDA Chapters 19 and 20 for “recording relationships to agents associated with a work or expression.” The upshot was to keep both on-screen and off-screen narrators in field 511.

From the Department of Redundancy Department

Question: I often feel that a lot of 5XX fields such as 538 require doubling in text what I would already be coding or describing in 3XX or 7XX fields. Do others recognize this? Is there a solution to not having to double the information?

Answer: For better or worse, MARC has always had built-in redundancies. The 007 fields code many elements that have been spelled out elsewhere, for example. That's become even worse with the proliferation of 34X and other fields that attempt to accommodate RDA. In this transitional period at least, some local systems are not equipped to do anything useful with 34Xs, for instance, so such fields as 538 remain useful in that sense. One thing that the Library of Congress has discovered in trying to make MARC/BIBFRAME conversions work in both directions, I've heard, is that some redundancies have been surprisingly beneficial. In some cases where one specific field or subfield cannot make the round trip, data are not necessarily lost because the round trip works somewhere else with the same information. More obviously, not all local systems can intelligently handle some of the newer fields such as the 34Xs, so it may be helpful to include both coded and textual versions of certain pieces of information. I would encourage catalogers to continue to honor the redundancies as we struggle toward a mythic linked data future.

Phantom Kit Syndrome

Question: I'm updating the local procedures for cataloging kits under RDA, a fairly hilarious exercise since RDA does not admit such things exist. It makes mention of them, but there are no instructions nor a definition in the RDA Glossary. Presumably you just take care of all the content, media, and carriers in 33X, add some 006s and 007s when appropriate and wind up with a kit. One thing (so far) that I'm concerned about: Our current procedures from around 2010 talk about the rules in AACR2 1.10 that define a kit. Those rules say you have a kit only when there are two or more components of distinct material types AND none of them are predominant. Our procedures go on to point out that libraries don't always follow those rules, choosing to call one component predominant when it really is not (LC tended to default to the print component whenever possible), due to how the library shelves things or other local decisions. The question then is what to do when you find copy for your kit that has chosen a predominant medium, but you don't think there is one and want to catalog it as a kit. The paragraph in our local procedures winds up by saying, "It is perfectly legal to put a new record in WorldCat for the same item cataloged as a kit." It goes on to cite an endorsement from OLAC founder Nancy Olson at an OLAC meeting in 1996. I am wondering if that is still true, especially given the ability in RDA to account for all content and carrier types in a single record. Nancy Olson's decision was 24 years ago. I looked at "When to Input a New Record" and all I found was at 4.1, Guidelines, under Record Format, which says, "Do not create a new record because you disagree about the choice of predominant materials (e.g., a set of slides with book vs a book with set of slides)" and goes on to say you can use 006 to account for the other material (and 3XX, I might add). Then there's another sentence, "If the resource contains multiple formats that are essentially equal, you may create another record with a different choice of predominant material (e.g., a sheet that contains text on one side and a map on the other side.)" I'm not sure either of those directives addresses my question. Both talk about a choice of predominant material, whereas my question concerns predominant material versus no predominant material. Can you help?

Answer: We might say that bibliographic kits are creatures of MARC and AACR2. As you note, RDA does not deign to grant them existence, as much as they may live on in MARC definitions and coding. MARC defines “kit” as “a mixture of various components issued as a unit and intended primarily for instructional purposes. No one component is identifiable as the predominant component of the item. Examples are packages of assorted materials, such as a set of K-12 social studies curriculum material (books, workbooks, guides, activities, etc.), or packages of educational test materials (tests, answer sheets, scoring guides, score charts, interpretative manuals, etc.)” (<http://www.loc.gov/marc/bibliographic/bd007o.html>). So in reality, if kits exist at all, they may be either assortments of two or more types of materials or packages of materials that may all be of a single type (usually print educational materials). Catalogers will certainly disagree about the identity of anything kit-like, including whether it has a predominant type of material. The advent of the 006 fields in MARC, defined in 1995 as part of Format Integration, profoundly altered both how we were able to look at “kits” and the flexibility we had in cataloging them. It’s hard to say that any guidance regarding “kits” dating from 1996, even guidance from OLAC’s founder Nancy Olson, can be given much weight a quarter century later, following Format Integration and RDA. If you find a WorldCat record for something kit-like that is identifiably the resource you have at hand, my suggestion would be to use that record and edit it according to current practices. Even if you disagree about any claims for predominant material. Whether you are comfortable editing and replacing the WorldCat record or editing it locally. In contrast to the mid-1990s, under the Expert Community you have vastly wider editing capabilities for most records, including the ability to change Type codes in many instances (BFAS 5.2.2; <https://www.oclc.org/bibformats/en/quality.html#editnonpccrecords>) or you may always ask us to make the corrections. Adding 006s, 007s, 33Xs, 34Xs, and other elements can make a resource identifiable and retrievable in ways that were not possible in the mid-1990s.

All Those 34X Fields May be IRItating

Question: If you have multiple playback characteristics, do you list them in separate 344 fields or in the same field but separate repeated subfields?

Answer: The OLAC Best Practices documents suggest that each individual term in any of the 34X fields be in its own field, even if it happens to be from the same controlled vocabulary or from no vocabulary at all. That’s looking forward to the linked data future in which each individual term might have its own Internationalized Resource Identifier (IRI).

ALA Meetings of Interest

ALA Virtual Midwinter is January 22-26, 2021. All times are listed in the Central Time Zone.

Saturday, January 23, 2021

The Future of Government Information – GODORT Discussion Group
1:30 PM – 2:30 PM

Sunday, January 24, 2021

ACRL Image Resources Interest Group Forum
10:00 AM – 11:00 AM

MAGIRT Discussion Group
10:00 AM – 11:00 AM

ACRL Technical Services Interest Group Forum
12:00 PM – 1:00 PM

REALM Discussion Group: REopening Archives, Libraries, and Museums during COVID-19
1:15 PM – 2:15 PM

ALA Core Virtual Interest Group Week is February 1-5, 2021.

Programming information for this free event will be available in late December via the Core Continuing Education website, on the [Interest Group Week](#) page.



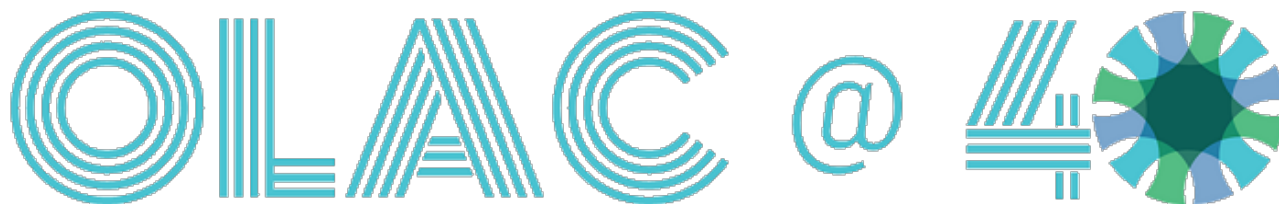
The Music OCLC Users Group (MOUG) is the voice of music users of OCLC's products and services.

Through our publications, annual meetings, and other continuing education activities, MOUG assists novice, occasional, and experienced users of all OCLC services in both public and technical services.

We also provide an official channel of communication between OCLC and music users, advocating for the needs and interests of the music library community.

A year's personal membership, including a subscription to the MOUG Newsletter, is **\$40 USD**. Institutional membership is **\$50 USD** per year. Please direct all correspondence to: Melissa Moll, MOUG Treasurer, 313-335-5889, melissa-moll@uiowa.edu. Please call or email for a mailing address.

For more information, visit our website at:
<https://www.musicoclcusers.org/>



OLAC Conference Wrap-Up

Hayley Moreno, Bryan Baldus, & Autumn Faulkner, Conference Co-Chairs

It's still unbelievable to us that the conference has come and gone! After more than a year and a half working on the event, the Conference Planning Committee is proud of the work it did on transitioning this conference from in-person to online. We want to thank all of the members of the Conference Planning Committee who helped organize this, the OLAC Board for their support, and the wonderful speakers who provided attendees with outstanding content. We almost had 300 attendees, many of whom were first time conference goers. It's exciting to hear how many of you were able to attend this conference due to it being online.

The 40th anniversary celebration proved to be a special occasion with many memories shared during our Zoom celebration event. Thank you to all who spoke about the organization and toasted to our past as well as the future. We also want to thank all attendees for hanging in there when we had technical glitches and managing the transition yourself of participating in an online conference. We understand that this change was not easy but based on your feedback it seems that most of you found the online conference enjoyable and were able to learn a great deal from the sessions. If you have not yet responded to the [conference evaluation survey](#), please do so. Responses to the survey will help inform future conference planners and the OLAC Board on what needs to be considered for the next conferences.

We also want to give a special shout-out to OCLC for providing us the video conferencing software WebEx and allowing us to use staff from the Metadata Quality department to host these sessions. This conference would not have been possible without their support.



All slides, handouts, and recordings for the conference are available [via the conference website](#). Make sure to use your login to access this content. After a certain period of time OLAC will be releasing this content to the general public.

We hope to see you in 2022 for the next OLAC Conference!

OLAC @ 40 Special Conference Section



Our Brady Bunch Group Photo during the 40th Anniversary Celebration via Zoom

Nancy B. Olson Award Recipient Statement

Kay Johnson

On September 1, I got an email from Mary Huisman with a subject line about an announcement from OLAC. I opened it and casually noticed it was something about the Nancy B. Olson Award. I skimmed it quickly to see who won the award this year, and, strange, but it seemed like I was the recipient. No, I must be mistaken, so I read the email thoroughly this time. The words sunk in that time, and I was so completely shocked and overwhelmed that I started crying. What an incredible honor, and I'm not sure how deserved it is! So many of you are as worthy or worthier recipients than I am to win this award. As I responded to Mary, I may be the worst, or at least the rustiest AV cataloger to win the Nancy B. Olson award.

I've only recently started cataloging actively again, and that's because I couldn't fill a catalog librarian position. I also told her cataloging, after so many years, is like riding a bicycle, except with RDA, it's like going from a 3-speed to a 20-speed bike. You see, I'm a generalist, and generalists don't win national awards in specialized fields. I hesitated for a moment in whether I should accept the award, but I did, very gladly, on behalf of all the other generalists out there struggling to find professional development opportunities while dealing with increasing workloads. These generalists may not have access to the RDA Toolkit, or they may be support

OLAC @ 40 Special Conference Section

staff who are not encouraged to pursue professional development. This is where OLAC comes in and is so important to us generalists. When I was formerly a general cataloging specialist, I regularly consulted OLAC's DVD guide, as well as Nancy Olson's *OLAC Newsletter* "Cataloger's Judgment" column on how to catalog episodes of TV series. We generalists need the specialists – the OLAC specialists are leading the efforts to train and provide resources in AV cataloging. With information science schools not requiring cataloging classes, and budget cuts in libraries causing elimination or deprofessionalization of cataloging positions, I worry about the future of cataloging. OLAC is needed now more than ever.



There are many who share in the Nancy B. Olson Award with me. I thank Richard Harwood above all. Richard was a colleague and mentor of mine at the University of Tennessee. As President of OLAC in 1996-1997, he invited me to edit the OLAC Conference Reports for the 1996 OLAC Conference in Denton, Texas, which was also the first OLAC Conference I attended. OLAC wasn't in my consciousness before I met Richard in 1995, although surely I had heard about OLAC from Nancy Olson when I took her weeklong AV Cataloging class at the University of Pittsburgh in 1994. One of my fellow students in that class was Kevin Furniss, who later became an OLAC President.

There are so many others who have supported me and been such good colleagues in AV cataloging over the years. I know I will miss listing all of you, and I apologize for that, but I want to especially thank the 2017 OLAC Conference Committee, who were never properly thanked in the newsletter previously. You all worked so hard to bring the conference together, and all of you mean so much to me – Autumn Faulkner, Teri Frick, My Guidarelli, Mary Beth Holm, Mei Kiu Lo, Elizabeth McCormick, Stacie Traill and honorary member, Christi Wayne. The OLAC Boards led by Annie Glerum and Jeremy Myntti were so supportive of the conference. Debra Spidal worked with us on OLAC Conference expenses while learning her new position as OLAC Treasurer and did a great job with both!

Wow, it was amazing attending the 2020 conference and seeing Glenn Patton, Mary Konkell, Jay Weitz, Jan Mayo, Bobby Bothmann... so many OLAC people that I adore and am in awe of. Kudos to Hayley Moreno and the conference committee for a successful conference, made more stressful by the decision and implementation to move from onsite to online. A heartfelt thanks goes to Mary Huismann and the Nancy B. Olson Awards Committee for all of their work and the lovely plaque that Mary sent to me.

Finally, I thank Nancy Olson, founding mother of OLAC. Her enthusiasm and drive to provide better and easier bibliographic access for audiovisual materials led to the first international standard rules for AV cataloging. And she didn't stop there. Nancy went out to train the cataloging world in AV cataloging, both in person, and through her books such as *Cataloging of Audiovisual Formats and Other Special Formats*, which were published by Soldier Creek Press, a small publisher I seem to recall was run by Nancy's daughter, but was founded by Nancy to produce cataloging books by such luminaries as Richard Smiraglia, Verna Urbanski, Ed Swanson, Jay Weitz, and herself. Nancy's legacy is part of OLAC today and will always be part of OLAC.

Conference Reports from the 2020 OLAC Virtual Conference

Jan Mayo, Column Editor

Creating Access Points for AV Materials: Attributes, Construction, and NACO Principles (Preconference) -- presented by Peter Lisius

submitted by Scott Dutkiewicz, Clemson University

This preconference on constructing authority records according to NACO (Name Authority Cooperative) principles and RDA standards was a comprehensive introduction (or refresher) for those who want to support their descriptive cataloging with authorized access points (AAPs). Peter Lisius, Music and Media Catalog Librarian at Kent State University and Coordinator of OLAC's NACO-AV Funnel Project is eminently qualified to present on this topic. After a discussion of basic principles from RDA chapter 8 and a review of the tools with which an authority librarian should be familiar -- RDA, the Descriptive Cataloging Manual (DCM) section Z1, and OCLC Connexion -- Lisius discussed the formulation of authorized access points for personal names, corporate names, and titles. His sources were television programs or films, but this training is applicable to any format. He made several specific recommendations. He suggested using IMDb (Internet Movie Database) as a source of information. He acknowledged a trend toward duplicated attribute (37x) fields since this is a trend in descriptive cataloging, though concatenated use (37x \$a \$a) is acceptable if both terms share the same thesaurus source in \$2. He strongly suggested entering all attribute data in 670 (Source data found), rather than spreading the information throughout the record in subfield v (Source of information).

Participants were able to observe a master at work as Lisius constructed records during the demonstration/participation sessions. As an added benefit, those unfamiliar with Authority toolkit <https://files.library.northwestern.edu/public/oclc/documentation/> were able to observe how it can make production in Connexion more efficient. Lisius was careful to answer each question by looking up the answer in MARC21, Z1 or RDA, thereby inculcating the lesson that the authority librarian cannot guess but must be certain to follow standards. Even in an online environment, there was lively interaction. The NACO funnel welcomes your participation! Hayley

OLAC @ 40 Special Conference Section

Moreno (host) and Sevim McCutcheon (moderator) should also be credited for their assistance that resulted in an excellent preconference.

Celebrating 40 Years of OLAC – Opening Session

submitted by Bobby Bothmann, University of Minnesota, Mankato

Conference chair Hayley Morena welcomed everyone to the conference and asked us to tweet with [#OlaCAt40](#). President Kristi Bergland welcomed us all to the conference and thanked the program and local planning committees, as well as our presenters, for guiding us through our everchanging realm of cataloging. Wearing her “40” spectacles, she mentioned some things that happened in 1980, like post-it notes and other significant things that happened the year OLAC was formed. Bergland noted we continue our journey learning and teaching each other about all the various nonbook and media formats. Jay Weitz, Bobby Bothmann, Julie Moore, and Glenn Patton, each gave a toast to OLAC, recounting their experiences learning about OLAC and participating in the various conferences, and remembering OLAC founders. Additionally, we played a few games, like a room rating game and video game genre term trivia. After a group photo of our faces in Zoom boxes, we watched a wonderful slideshow presenting images of materials from the OLAC archives and pictures from past conferences. There were many thanks all around for all the hard work the program and local events committees provided for the conference.

Basic Cartographic Workshop -- presented by Tim Kiser, Catalog Librarian for Maps, Michigan State University Libraries

submitted by Laura Kane McElfresh, Cartographic Metadata Librarian, University of Minnesota Libraries

Map cataloging expert Tim Kiser told attendees that his current position (“a dream come true”) combines his love of cataloging with his love of maps. He also noted that although he has taught map cataloging before, this would be his first time presenting such a workshop in a virtual setting. Kiser began the workshop with a briefly annotated bibliography of recommended map cataloging resources.

For the rest of the two-hour period, Kiser discussed the philosophical underpinnings, principles, and process of cataloging a sheet map, drawing attention to the differences between cataloging maps and cataloging print (text) resources. Since a map is “expressly intended as a 2-dimensional substitute for a 3-dimensional reality,” a map cataloger must not only describe the information the map contains, but also must describe the representational aspects of the map, addressing characteristics such as scale and projection. And since a map presents graphic rather than textual information, the cataloger’s choice of source for its bibliographic information (e.g. title) may not be as straightforwardly indicated -- or as rigidly defined -- as with a book or other text resource.

OLAC @ 40 Special Conference Section

While an in-person workshop would have allowed participants to examine physical examples of maps in order to learn descriptive techniques, obviously this was not the case at an online workshop. However, Kiser handled this very well by providing in-depth scans of example resources to accompany the presentation slides. Thus, when the slides included an image of a map, attendees could pull up the much larger-scale version on a full screen and magnify. Then, when actual demonstrations with physical maps were necessary, Kiser incorporated videos: Paige Andrew's [How To Measure A Map](#) and Susan Moore's [How to Use a Natural Scale Indicator](#).

Kiser demonstrated how to examine a folded sheet map by first presenting images of the folded map in its panel or cover; next one unfolded side, then the other; and finally brought attention to images of details on the sheet(s). Attendees learned how to tell the difference between main, ancillary, and inset maps; how many main maps and how many sheets a map has; what the "neat line" is and how to measure a map; and how to record all this information in the Physical Description field. Next, Kiser discussed how to find (or construct, when necessary) and record a map's title, statement of responsibility, and access points for creators and contributors. Here, he emphasized another important difference between map cataloging and text resource cataloging: the most comprehensive title should be taken as the main title for a map, whether it appears on the panel, cover, or on the map itself. Other titles may then be added as variants, with Kiser preferring to add as many variants as are warranted.

Finally, workshop students learned how to determine a map's scale, projection (if given), and coordinates, and how to record them in the Mathematical Cartographic Data field and in the fixed fields. Scale should always be recorded as a representative fraction (RF); in cases where the map gives a scale but not an RF, the cataloger will need to perform conversions or measurements. Projection should only be recorded if it is stated on the map, but coordinates need not be given on the map. Indeed, Kiser recommends that catalogers record bounding box coordinates whenever possible: it is fun, easy, more precise than text descriptions, and very helpful for map-based search interfaces. He finished the session with a live demonstration of the [Klokantec Bounding Box](#) online tool, encouraged attendees to contact him with any further questions, and invited learners to return the next day for the Advanced session.

Basic Sound Recordings Workshop – presented by Mary Huismann, Music Catalog Librarian, Olaf College

submitted by Liz Kielley, Messiah University

For those of us new to sound recording cataloging, Mary Huismann started off with the classic quote from Jay Weitz, "Don't Agonize!" Even if we were new to sound recording cataloging, there was the expectation that we were familiar with RDA cataloging principles, knew MARC21 and ISBD, and had access to the RDA toolkit. The objectives of the day: Locate RDA instructions in the RDA toolkit; music cataloging resources (list with links given in a separate handout); and identify the MARC21 fields and subfields. While there are many types of sound recordings, the

OLAC @ 40 Special Conference Section

workshop concentrated on cataloging CDs, since there was not enough time to cover everything. Also, certain aspects of cataloging were not covered: classification; subject headings; and authority records.

Huismann gave a quick review of the differences between RDA and AACR2, alerted us to the Music Library Association Best Practices in RDA, and explained that RDA is organized by FRBR core elements. Using a CD example, she fleshed out the WEMI concept from FRBR

Extremely beneficial was the way Huismann included the RDA section, explanations, best practices with examples, and then ended with a quiz to help reinforce what we had just covered.

Decoding RDA terminology (section 1) was helpful, especially the difference between “describe” and “record.” Abbreviations allowed under RDA and MARC codes (008 and 007) specific to music were highlighted. Section 2 covered preliminary decisions. First, do I need a new record? Next, determine the preferred source of information for the title proper. The manifestation (disc or disc label) are common sources, but the container or accompanying material can also be used, if needed. Section 3 covered Manifestations and Items: title, responsibility, publication, dates, and identifiers. Huismann discussed the title proper--generic vs. distinctive--and parallel titles. A collective title is preferred. Transcribe the title proper exactly as found on the item. The “rule of 3” no longer applies so you can list all persons responsible in the statement of responsibility.

In Section 4, Huismann discussed Carriers – the 3xx fields, extent, dimensions and sound/digital file characteristics. A helpful resource is the MLA/OLAC Joint Task Group recommendations. Sections on Work and Expressions, Content, and Relationships rounded out the workshop. Huismann provided several full MARC record examples of single works, opera, soundtracks, popular music, and more.

And just as we started with a quote, we ended with one: “Perfect is the enemy of the useful” – a play on Voltaire.

Basic Video Workshop -- presented by Jay Weitz, Senior Consulting Database Specialist, OCLC

submitted by Amanda Mack, University of California, Los Angeles

Jay Weitz’s presentation covered a wide range of topics related to cataloging video materials, from a brief history of the technology and sources of information to physical description and dates. Before diving into the topic at hand, Weitz encouraged people to join MOUG and/or OLAC and referred us to the best practices documents that OLAC has made freely available on the website.

OLAC @ 40 Special Conference Section

Weitz gave a brief history of DVDs and Blu-ray Discs, the technology behind them, and how they are different from one another. He emphasized that we remember two key dates, as they can help with interpreting all the different dates you typically see on a DVD or Blu-Ray. DVDs were first released in Japan in 1996 and in the United States in 1997, so no DVD will ever have a publication date before 1996. The first Blu-ray titles were released in 2006, so no Blu-ray can have a publication date before that. If you see an earlier date on the packaging, it is likely important and can be recorded, it is not the publication date.

From here, we moved on to preferred sources of information. Weitz discussed both RDA and OLAC Best Practices because they differ somewhat, with OLAC giving additional options not covered in RDA. We also looked at coding in the 006 and 007 fields. Some of these only have one option that will apply to video, but others, such as those that pertain to color or sound have several options. Each of those was clearly defined to help you best understand what to choose for the material you have in hand.

Since dates can be complicated for video materials, Weitz spent a good amount of time discussing the 260/264 fields, including the best choices for indicators for the most common resources catalogers encounter. We also covered different sources for dates, including the video image, disc label and container, as well as the different bibliographic “events” to which those dates might refer. For example, motion pictures have dates associated with the original production, the original theatrical release, any earlier video format releases, and even the copyright of the design of the packaging. Catalogers should always include a 500 note with the date of original theatrical release.

Next, Weitz talked about three RDA fields that should be included in bibliographic records whether you are cataloging fully in RDA or not. These are the 336 (content type), 337 (media type) and the 338 (carrier type). Each of these was explained in detail, including where you can locate the documentation in RDA. Several other RDA fields that should be included if you are cataloging with RDA, such as the 344 (sound characteristics), 346 (video characteristics) and 347 (digital file characteristics) were also covered. The presentation slides for all of these are very detailed and would be a great reference source.

We also spent some time covering aspect ratio as it is likely to be part of the next MARC 21 update. The presentation slides had some very useful illustrations of different aspect ratios you are likely to encounter as a video cataloger, and Weitz also discussed common naming for these variations, such as letterbox, pan-and-scan and pillar box. In addition, we learned best practices for where to record this information.

Advanced Sound Recordings Workshop – presented by Mary Huismann, Music Catalog Librarian, Olaf College

submitted by Alex Whelan, Columbia University

Over the course of two hours, Mary Huismann gave a thorough presentation of specialized topics related to sound recordings, including non-musical recordings and a walkthrough of various audio carriers and media devices. The stated objectives of the workshop were to identify different sound formats, locate RDA instructions for relevant description, learn about music cataloging resources, and identify MARC 21 fields and subfields more accurately.

The workshop began with the question of when “Do I need a new record?” Huismann explained a new record should be created if a resource has a different format, size, speed, publication date, publication number, or differing characteristics such as stereo vs. mono. For description, catalogers are encouraged to determine the type of RDA description they need—comprehensive or analytical. The preferred source of information for cataloging is the manifestation itself, such as the disc, cassette, or cartridge or the label. The preferred order is to use a container, accompanying material, then other published descriptions of the resource, then a container not issued with the resource, and finally any other source. If applicable, another source with a formally presented collective title can be used. Another common source of information is the spine card often folded over CDs known as an obi strip. Huismann discussed how to identify commercial availability based on format - 1948 for vinyl, 1965 for audio cassettes.

Huismann focused on spoken word recordings such as audiobooks, readings, and exercise or language instruction which fall into the category “nonmusical sound recordings.” Huismann discussed MARC leader coding and how to determine a statement of responsibility from the same source as the title proper. Given narrators go in MARC 511, technical credits in MARC 508, and performers listed in MARC 505. An edition statement can be sourced as well. Huismann discussed the applicable 33x fields and respective terms lists to describe content type, media type, and carrier type. Digital file characteristics such as file type and encoding format in MARC 347 subfield a and subfield b can also be applied. Some fields such as summary and audience are core elements for fiction intended for children, while other fields such as contributors and resources are not core elements. Creators are a core element for any resource. Huismann also discussed the leader and content/media/carrier terms for non-musical audio, such as recordings of sounds, sound effects, mechanical sounds, and bird calls.

Next, Huismann transitioned into identifying characteristics of digital formats. She reviewed identifying discs and what resources to use for identification. Such resources include VSO Inspector, K-Probe, DVD Identifier, and VLC Media Player. We learned about five formats including their availability dates, distinguishing characteristics, and recommended elements to include—Super Audio CDs (SACD), DVD-Audio (DVD-A), Blu-Ray Audio, DualDisc, and Enhanced CDs. In addition to disc formats, Huismann described MP3s and MP3 audiobooks, noting that

OLAC @ 40 Special Conference Section

these are file formats though it is still recommended to select the terms “audio disc” / “computer disc” due to the limitations of the terms list.

The next section covered audio discs, beginning with vinyl records. Huismann discussed how to identify information about color and shape in a note field, as well as how to describe the disc’s dimensions and playing surface characteristics. Huismann explained manual sequence as opposed to automatic sequence, and the preferred terms such as “audio disc” in the 300 field, “vinyl” in the 340 field, and specific playback terms such as “microgroove”, “stereo/mono”, and “rpm” which can be recorded in various 344 subfields. This section covered 33 1/3 rpm, 45 rpm, and 78 rpm. For identifying particular records, matrix numbers are in the “run out” area. Other formats discussed were audio tapes / audio cassettes, digital audio tape, reel to reel tape, 8 track cartridges, mini disks and flexi discs.

The final section of the workshop centered around media devices. Huismann mentioned the MLA/OLAC Media Devices RDA Best Practices Task Force and the scope of portable devices with pre-loaded content, digital media storage devices, and portable media devices. Examples included Playaway Audio, SlotMusic, and USB drives. For a device such as USB drives, this would be described in a 300 note as “USB flash drive (file size)” with a 338 term “computer chip cartridge”. Huismann concluded the workshop with the helpful quote from ARSC Guide to Audio Preservation: “Perfect is the enemy of the useful.”

Archival Materials Workshop – presented by Elliot Williams, Digital Initiatives Metadata Librarian, University of Miami, Coral Gables

submitted by Allison Bailund, San Diego State University

Elliot Williams gave a comprehensive introduction to cataloging archival materials. He began with a crash course in archival theory, briefly discussing DACS & EAD and providing the audience with a general understanding of archival description. Going over the DACS statement of principles, Williams highlighted a few points and noted that context is everything. “Good archival description cannot just depict the physical and intellectual characteristics of documents. It must communicate how the accumulation of documents in a collection represents and provides evidence of the major functions of an organization or individual.” (DACS, Statement of Principles).

He then discussed collective, hierarchical description and noted that archival description focuses on groups of items and is both iterative and flexible. He briefly touched on the notion of MPLP: More Product, Less Process (Greene & Meissner, 2005) and the three levels of description: minimum required; optimum; and value-added, before turning to finding aids.

Williams highlighted the difference between finding aids and bibliographic records. A finding aid is a guide to doing research in a collection. It discusses the items’ provenance and history in addition to telling how the collection is organized whereas a bib record tells what the resource is and how to get it. For a clearer picture of the depth of finding aids, we looked at a specific

OLAC @ 40 Special Conference Section

example: [C.O.P.S./Metro Alliance Records, 1954-2015](#) from the University of Texas at San Antonio.

Williams led the audience through the finding aid, noting the different elements and briefly discussing the layout. He specifically mentioned it is common to include information about the collection's processing in the finding aid, including staff/students who did the processing as this can clarify what interventions have happened. A brief overview of EAD and DACS followed. Williams noted that the relationship of EAD : DACS is similar to AACR2 : MARC, though DACS can be used in other formats. Also, DACS is freely available online while RDA requires a subscription.

The second half of the session focused on MARC records for archival collections. First, Williams talked about why MARC records are helpful, noting that they aid in discovery by making archival collections available in library catalogs along with WorldCat and ArchiveGrid.

However, MARC records for archival collections are complicated. The record itself is a surrogate of a surrogate: archival collection > finding aid > MARC record. The MARC record also needs to remain accurate as the collection is further processed or possibly grows with new materials or donations. One audience member noted they provide archival staff with a document stating which changes/additions will necessitate a MARC update.

Following this helpful tip, Williams led us through an in-depth look at MARC records for archival collections. After noting that you can use either DACS or RDA, he led the audience through a field by field discussion that started with the Leader and Fixed Fields. Williams mentioned he finds it helpful to include the production dates (264_0 \$c), but he focused most of the discussion on 5xx fields, including scope and contents (520) and biographical note (545). He also talked about the different types of genre/form terms (655) found in catalog records and said he typically uses [AAT](#), [TGM](#), and on occasion [LCGFT](#).

The session ended with a hands-on exercise as the audience and Williams created a MARC record for the [C.O.P.S./Metro Alliance Records, 1954-2015](#) finding aid. Williams was an engaging speaker; he took questions throughout the session and many in the chat chimed in with their own experiences and offered their expertise and examples.

Video Games Workshop -- presented by Rosemary Groenwald, Head of Collection and Bibliographic Services, Mount Prospect Public Library

submitted by Deborah Ryszka, University of Delaware

Rosemary Groenwald gave an in-depth presentation on the basics of video game cataloging. Her presentation, entitled "I don't play video games (so how do I catalog them?), provided novice and experienced catalogers with a hands-on opportunity to learn about the specific MARC fields

needed to create, upgrade, and edit bibliographic records for video games. Groenwald's two-hour workshop covered the descriptive elements necessary to produce full and complete bibliographic records, as well as the headings needed to provide subject and genre access to these materials.

She concentrated on video games that are cataloged on these specific video game platforms: Nintendo 3DS, Nintendo Switch, PlayStation 4, Xbox One, and WiiU. Video game developers usually release the content of new games to each of the companies that publish the currently available platforms. The core content of a video game is often the same; the platform and publisher are different. Groenwald gave several examples of this, including *SpongeBob SquarePants: Battle for Bikini Bottom Rehydrated*, which was released on the PlayStation 4, Nintendo Switch, Xbox One, and other platforms.

Groenwald began her presentation with the core elements needed to catalog video games according to Resource Description and Access (RDA). She gave attendees guidance on how to transcribe the title proper and other title information for video games. She noted that the source of information for the title proper of video games is the title frames. If title information from this source cannot be viewed via a console system, catalogers are instructed to take title information from a label printed on or affixed to the resource, from the container, or from the container insert. When one of these options is followed, a note should be made indicating this.

The MARC leader and 007 fields contain specific values that relate to particular aspects of video games. Coding these fields properly according to current MARC standards is an important aspect of cataloging video games. Position 06 in the Leader field should be coded "m" for computer files. MARC field 007 for electronic resources is used for cataloging video games and consists of codes that relate to the physical characteristics of video games. The specific material designation in MARC field 007 designates the type of video game being cataloged. For example, Nintendo Switch cartridges are coded as chip cartridges in the \$b position in the MARC 007 field. Other parts of the MARC 007 field record the dimensions of video games, if they have sound and are in color.

MARC fields 024 and 028 contain numbers or codes that are present on video games. Groenwald pointed out that video games often have numbers that appear in several places on the games and containers. Publishers are not consistent with how and where they place these numbers. Numbers can be visible on the disc or cartridge itself, on the container, on the spine of the container, on the container insert, and other places. Catalogers should record all these numbers when found.

Groenwald discussed at length franchise titles and how these should be recorded and coded. Titles of video games that are part of franchises (e.g., *SpongeBob SquarePants*, *Grand theft auto*, *The legend of Zelda*, etc.) are particularly troublesome for catalogers. Current cataloging rules have never dealt well with the modern concept of a franchise in video cataloging. For the specifics

OLAC @ 40 Special Conference Section

of recording titles, other title information, and franchise titles, Groenwald suggested consulting the appropriate rules in RDA and the specific guidelines for these areas in OLAC's [Best practices for cataloging video games using RDA and MARC 21](#). For help with determining whether specific games are part of franchises, the Wikipedia article on video game franchises is helpful and has a lengthy list of titles.

MARC field 264 contains publication information and is another core element in RDA. This information can be found in various places on video games, according to Groenwald. The preferred source of information for publication information is the same as that used for the title proper. If the data elements needed to record this information cannot be found there, the container itself can be used as a source as well. Actual publication dates typically are not included on video game discs or cartridges, although they do appear sometimes. If there is no publication date, use the copyright date to infer a date of publication and record that date in brackets in the \$c portion of the MARC 264 field.

The MARC 300 field records the physical description aspects of video games, including the extent and dimensions. Examples of authorized RDA terms for the \$a of the 300 field include computer disc, computer disc cartridge, and computer chip cartridge. Groenwald remarked that computer optical disc is used in numerous bibliographic records for describing the extent of video games, but this is not an authorized RDA term for any video game.

Groenwald explained the values that catalogers need to use to code MARC fields 336, 337, and 338. Further discussion focused on MARC fields 340, 344, 346, and 347, and the vocabulary used in these distinct fields. Mention was made of the new controlled vocabulary lists that recently were added to MARC 21 documentation. These lists should be consulted and noted when recording data in the 3XX fields.

The session covered detailed instructions on how to code for language in bibliographic records for video games. In instances where viewing the game is not possible, catalogers must rely on other sources or parts of the game to gather information about the language of the item. When this situation occurs, Groenwald advises using the label on the game or the container for the game to determine language content. Catalogers should use MARC fields 008, 041, and 546 to record the language aspects of video games.

As with other formats and materials that are cataloged, catalogers of video games can make extensive use of notes to record other aspects of video games that may be important to users. MARC field 521 contains information about the target audience of the video game. The wording in this field should be taken from the container of the video game. The systems requirements for video games are placed in MARC field 538. Player details for video games are taken from the container or container insert and are recorded in the 500 field.

OLAC @ 40 Special Conference Section

Catalogers are encouraged to add subject headings to bibliographic records for video games. The appropriate subdivision to be used with all Library of Congress Subject Headings (LCSH) is \$v Computer games. The information about the video game that is presented on the container or insert is the best source for determining the subject of the video game. In addition, the images on the cartridge, disc, or insert can provide ideas for possible subject headings.

Video game cataloging is complex, with many rules and standards to follow to create quality bibliographic records. Groenwald touched on the basics of how to do this in her two-hour session.

Advanced Cartographic Workshop -- presented by Tim Kiser, Catalog Librarian for Maps, Michigan State University Libraries

submitted by Laura Kane McElfresh, Cartographic Metadata Librarian, University of Minnesota Libraries

Tim Kiser welcomed OLAC attendees back for “Cartographic Resources Cataloging: Advanced Topics”. With the fundamental principles and basic methodology of cataloging a sheet map having been covered the previous day, participants were ready to tackle RDA/MARC-based treatment for notes fields, the special MARC 007 cartographic field, subject analysis and genre/form terms, and LC classification, plus the differences in cataloging atlases and globes versus sheet maps.

Many cataloging details, unique to cartographic formats, are recorded in Notes fields (“500 notes”); thus, these notes can be quite as numerous as they are essential. Kiser recommends that map catalogers should order their 500 notes consistently. Kiser’s typical order for 500 fields (not listing 505, 546, etc.) includes: 1) Nature and scope of item (“translate the graphics into words”; indicate any special characteristics of the map; give reasons for subject headings; include keyword search terms); 2) Relief and/or bathymetry (indications of land height and water depth); 3) Source of title proper (cover, panel, etc.); 4) Orientation of north (only note if north ≠ “up”; for example, this may be the case if a city resides on a “tilted grid” like Toronto, or if a choice of north has been made as a deliberate act of cartographic decolonization); 5) Unique mathematical data, such as a geodetic system or a non-Greenwich prime meridian; 6) Unique numeric or alphanumeric codes (“secret publisher codes”) and other quotes found on the map itself; 7) “Includes” note and “On verso” note, describing non-main map content, with its own recommended order of information; 8) Any useful ancillary/inset maps not mentioned in “Includes” or “On verso” notes; and 8) Any other needed notes can go somewhere in the middle.

Next, Kiser discussed encoding of the 007 field for cartographic materials, which includes information from the physical description. Coding for two of the most common types of maps (color map on paper; one-color map on paper) was examined in some depth; Kiser suggested that keystroke macros or constant data profiles might prove useful for these two configurations,

OLAC @ 40 Special Conference Section

and that map catalogers often end up memorizing them as a matter of course. To help attendees understand the different codes used for the specific material designation, he showed examples of various types of cartographic materials, before moving on to subject analysis and genre/form terms.

Paige Andrew's "[Map Show and Tell](#)" video provided a quick overview of the kinds of maps one might encounter in a map library: basic, general maps of a city, county, or state; maps made to serve a specific function, such as a map of power lines or the Sanborn Fire Insurance maps; and some interesting niche maps, including a wine map of Italy and a map of baseball stadia in the USA. With these examples in mind, workshop attendees then considered subject analysis and genre/form terms. Genre and form terms for maps (of which Kiser provided an [extensive list](#)) help to convey the "publisher's intent." The cataloger should use the titles, legend, and other aspects of the map to determine what the cartographer was trying to communicate, and then employ genre and form terms as needed and appropriate. Subject headings can also assist here: in addition to the obviously necessary geographic subject headings, cartographic catalogers can employ topical headings with geographic subdivisions (where allowable) and \$v Maps.

Next came an overview of map classification using the Library of Congress Classification "G" Schedule. Unlike books, sheet maps are stacked flat on top of each other, in reverse chronological order; also unlike books, they tend to be grouped by age before publisher, and are classed by their date of situation (when the map "is", so to speak, rather than when it was published). With a limited space of call numbers in which to accomplish this, the G schedule has a structure unlike other areas of LCC; but its patterns -- although complex, to the uninitiated eye -- remain internally consistent, with very few exceptions.

Kiser closed the session with a discussion of cataloging atlases and globes. Overall, the concepts and fundamental process remain similar to cataloging sheet maps; the differences mainly lie in the coding of fixed fields, the construction and coding of some particular variable fields, and the subject headings, genre/form terms, and classification. An atlas is cataloged as a cartographic resource but is treated like a book with respect to the physical description and choice of information and is grouped with other atlases in the LC G schedule rather than with the sheet maps. Cataloging a globe (usually a "once in a lifetime experience", Kiser says) requires knowledge of new terminology for the physical description. Additionally, a globe will generally include even less information about itself (e.g. titles, legends, etc.) than the average sheet map; and once again, globes will obviously not be classed together with sheet maps! On that note, Kiser once again supplied his contact information and encouraged workshop attendees to send him any further questions, and finished another informative, enjoyable session of cartographic cataloging instruction.

Advanced Video Workshop -- presented by Jay Weitz, Senior Consulting Database Specialist, OCLC

submitted by Bruce J. Evans, Baylor University

As usual, Jay Weitz presented an informative and insightful workshop on the more complicated aspects of cataloging videos. He began by recommending membership with OLAC, and MOUG (Music OCLC Users Group) for those that also catalog music. Weitz also highlighted the work of OLAC's Cataloging Policy Committee (CAPC) and their vital role in providing guidance for media resources. Relatedly, OLAC has created many best practice documents to aid in cataloging media formats. The final resource highlighted was the Best Practices for Music Cataloging Using RDA and MARC21, available in the Toolkit, and the Supplements to them (the latter available on MLA's Cataloging and Metadata Committee's website).

Weitz began the main part of the workshop by discussing the particulars surrounding title in video recordings. He mentioned that it would be easy to devote an entire session exclusively to videorecording title issues.

The first concept he focused on was franchise title. Weitz reading the general definition of franchise title from the OLAC *Best Practices for Cataloging Video Games Using RDA and MARC21*. A notable excerpt: "When a franchise title is involved, the industry standard appears to record the titles in this format: 'franchise title: individual title' (no space before the colon). The franchise title can be treated as part of the title proper when it appears in this manner in the preferred source of information." Example below:

```
245 04 The hunger games: Catching fire
246 30 Catching fire
246 3  Hunger games 2
```

Note that the colon between "games" and "catching" is not regarded as ISBD punctuation, and it is not set off by a space followed by a subfield.

Another tricky area concerns parts, sections, and supplements. Weitz focused on RDA 2.3.1.7, and the accompanying OLAC Best Practice: "If the title of the larger part is present along with the title of the part or section, first determine if the title of the part or section is substantial enough to identify the resource. If it passes this test, use the part or section title as the title. If it does not pass the test, record the title of the larger part, followed by the part or section title. If there is numbering or other designation, it is placed between the main and part or section title." However, if the title of the part, section, or supplement is insufficient to identify the manifestation, then "record the common title followed by the title of the part, section, or supplement" (RDA 2.3.1.7.1). Example below:

OLAC @ 40 Special Conference Section

245 00 Looney tunes. \$p Golden collection. \$n Volume 2.

On the other hand, if the separately issued part, section, or supplement is sufficient to stand on its own, record it as the title (RDA 2.3.1.7.2). Example below:

245 03 An unhealthy government experiment : \$b Western
Australia, 1897 to 1937.
490 1 First Australians, the untold story ; \$v episode 5
830 0 First Australians ; \$v episode 5.

Introductory words should also not be considered a part of the title (OLAC BP for RDA 2.3.2.7). If desired, you may create a 246 “At head of title” note. Example below:

245 00 Ponyo / \$c a Studio Ghibli film.
246 1 \$i At head of title on disc: \$a Disney presents a
Studio Ghibli film

The same OLAC BP notes that introductory words that are an integral part of the title should be recorded as part of the title proper, with unadorned title transcribed in a 246.

245 00 William Shakespeare's Romeo + Juliet.
246 30 Romeo + Juliet
246 3 Romeo and Juliet

Weitz moved onto the Statement of Responsibility (SOR) in videorecordings (covered in RDA 2.4.1.1). Generally, SOR covers agents responsible for the realization of and the intellectual or artistic content of the resource. However, the cataloger must be more selective with what to record, as it would be far too onerous to include everyone, especially with more recent films. SOR information is spread out over the 245 \$c, 508, and 511 fields (and occasionally the 505). The 245 \$c typically includes agents with “a major role in creating a film”, as defined in AACR2. This includes producers, directors, writers, and others with some degree of overall responsibility for the work. The 511 generally includes “the cast”, such as featured players, performers, narrators, and/or presenters. And the 508 includes “Credits”, which include those who have contributed to the artistic and/or production of the work not named in the 245 \$c. This can include photographers, cinematographers, music/composers, animators, and others. These guidelines are based upon AACR2 and LCRIs but are still useful today.

In the April 2015 RDA Update, the instructions regarding SOR. RDA 7.23 and 7.24 were deprecated in favor of references back to RDA 2.4 and 2.17.3 and RDA Chapters 19 and 20 for “recording relationships to agents associated with a work or expression.” Weitz followed this up with the OLAC BP’s statement on SOR Relating to Title Proper (RDA 2.4.2).

The remainder of Weitz’s SOR comments dealt with Note on Manifestation (RDA 2.17), Note on Statement of Responsibility (RDA 2.17.3), and Other Information Relating to a Statement of

OLAC @ 40 Special Conference Section

Responsibility (RDA 2.17.3.5). This information is divided between the 508 and 511, with technical credits going in the 508 (RDA 2.17.3.5 and accompanying OLAC BP), and Performer Credits in the 511 (RDA 2.17.3.5 and accompanying OLAC BP).

After answering several questions clarifying earlier points of discussion, Weitz took a final question centered on how to handle agents noted as “Story by”. Weitz replied that screenwriters are usually credited as such. Many times, a “Story by” credit refers to earlier story that screenwriter based their writing on. The cataloger will want to include 7xx for storywriter, and in some cases, 7xx \$t for story movie is based on (and you would not include a \$e with a 7xx \$t combo).

Weitz next covered the area of language in videorecording cataloging. In most circumstances, multiple language information points will need to be encoded, specifically in the 008/35-37, 041, and 546. As with title, an entire workshop could be devoted to videorecording language issues. Weitz referenced the OLAC BP Video Language Coding, but cautioned that since its creation in 2012, the 041 has undergone many changes. After covering the most commonly used subfields, he cautioned against routine use of the \$n and \$m, per BP, and recommended always including \$h for original language when known. Then, he summarized elements for routine coding (008/35-37, 041 subfields a, h, l, j, p, q, and r) and data recommended not to code (packaging language(s) (disc or tape label, container, disc menu, special feature language information (audio commentary tracks on DVDs and Blu-ray Discs, spoken and written languages on special features, credits, and accompanying material, such as guides and booklets).

Weitz went on to cover what scenarios call for the use of the 041, which include a soundtrack having different language versions, subtitles in different languages, intertitles for silent films, and the medium of communication includes sign language.

The 546 field is used for the language of soundtracks, intertitles, and subtitles. While video accessibility content has been recorded in the MARC record for quite some time, it has been buried in notes, such as the 546 field. This led to OLAC and the Canadian Committee on Metadata Exchange teaming up to create the 341 (Accessibility Content) and 532 (Accessibility Note) fields. OLAC BPs do not yet provide guidance for these fields. For now, we do have RDA 7.14.1.1 to provide guidance on Accessibility Content and its accompanying LC-PCC PS (the latter of which deals entirely with sign language).

For current practice, Weitz recommends using the 532, and to refrain from using the 341 until BPs exist to provide usage guidelines. See 532 field description and scope in LC MARC 21 Format for Bibliographic Data for more detailed usage information.

Weitz explained the difference between closed-captioning and subtitles. Subtitles are for those that can hear the soundtrack but may not understand the language being spoken. Subtitles also do not include non-textual data. Closed-captioning, on the other hand, is intended for those that

OLAC @ 40 Special Conference Section

cannot hear the audio (including due to being in a noisy location, for instance) and have non-textual data for context, such as indications of laughter, nonverbal sounds, sound effects, and identification of speakers. A more recent innovation analogous to closed-captioning is SDH, or “Subtitles for the Deaf and Hard-of-Hearing,” which does not require the use of a decoder, and lacks the black bars of CC, therefore hiding less of the video image.

There are also audio enhancements for the visually impaired, which include descriptions of scenery, action, costumes, gestures, and other visual elements that do not interfere with existing dialogue.

Identifiers for videorecordings are another area that can be tricky, because there are many different varieties, and some are very similar to each other. When there are multiple identifiers, recording more than the first is optional, but encouraged by an OLAC BP. Be sure to record qualifying information in a \$q in parentheses.

As with many other formats, videos may have either 10-digit and/or 13-digit ISBNs and are recorded without hyphens or spaces. However, the field that videos can have in many different varieties is the 024: Other Standard Identifiers. These can include Universal Product Codes (1st indicator 1), International Article Number (1st indicator 3), source specified in \$2 (1st indicator 7), and unspecified type of standard number or code (1st indicator 8). They are also recorded without hyphens or spaces.

The final category of Identifiers Weitz covered were Publisher and Distributor Numbers. 028 1st indicator 4 covers publisher numbers, and since 2016 via a joint MLA/OLAC effort, 028 1st indicator 6 covers distributor numbers. To tell the different numbers apart, MARC defines distributor number as “Assigned by a distributor to a specific music/music-related publication or to a specific video recording.” MARC advises that if you are “In doubt as to whether a number is a publisher number or a distributor number, record it as a publisher number.” Prior to Format Integration, videorecording publisher numbers were placed in the 037. 037s are now used for stock numbers, and OLAC BP states that “Stock numbers differ from the other identifiers ... in that the number is usually not present on the resource. It may come from a catalog, a supply list, website, etc.”

Weitz finished up the workshop by addressing videorecording durations and awards notes. Referencing RDA 7.22 and OLAC BP, Weitz highlighted the fact that you should only record the total duration of the primary content if it is readily ascertainable, excluding bonus features, in the 300 \$a following extent. If an approximate time is either stated or can be readily ascertained, record the time preceded by *approximately*. And if time cannot be readily ascertained or estimated, omit it. Additionally, duration information can be recorded in a 505 or a 306.

Lastly, an Awards Note is input in the 586, and is defined by RDA 7.28.1.1 as “A formal recognition of excellence, etc., given by an award- or prize-granting body, for the content of an expression.”

OLAC @ 40 Special Conference Section

And OLAC BP advises inputting them if considered important and putting multiple awards in separate 586 fields.

Basic Scores Workshop – presented by Morris Levy, Head, Bibliographic Initiatives, Ohio State University

submitted by Thuy-Anh Dang, University of North Carolina at Chapel Hill

Morris Levy, a long-time music cataloger, based his presentation on the 2014 OLAC Conference workshop by Margaret Corby, Kansas State University. Levy presented a clear and well-paced workshop, punctuated by strategic pauses for audience questions. He began by defining that his presentation covers descriptive cataloging under the current RDA rules, and spent a good amount of time covering the RDA Toolkit, RDA, the LC-PCC PS, the Music Library Association Best Practices, as well as the probability of rule changes coming with the switchover to the RDA Toolkit Beta.

Levy helpfully used numerous title pages and facsimiles of actual scores to walk the audience through the description process, starting with title proper and continuing through these RDA elements: parallel title proper, other title information, parallel other title information, statement of responsibility relating to title proper, designation of edition and parallel designation of edition, place of publication, publisher name, date of publication, copyright date, distributor's name, mode of issuance, identifier for the manifestation, content type, media type, carrier type, extent of notated music, extent of text, dimensions, form of musical notation, duration, authorized access point for creator, relationship designator, preferred title for a musical work, access to related work(s), and supplementary content.

Levy made sure his audience understood what a score is, what a part is, and what the difference is between a score with many parts vs. a collection of scores. The audience was able to come away with a basic understanding of how to look at a score, of which RDA elements are necessary for cataloging a score, and of which RDA rules to refer to. Levy also included several opportunities for the audience to try cataloging scores themselves, and the resulting discussions were especially illuminating.

Advanced Scores Workshop -- presented by Morris Levy, Head, Bibliographic Initiatives, Ohio State University

submitted by Nurhak Tuncer, Elizabeth City State University

During this virtual presentation, Morris Levy presented “Advanced Scores,” which is outlined as follows: “Access points for music titles, Types of composition terms, Medium of performance terms, LC Classification and Compilations.” While showing detailed examples of items, Levy gave specific RDA and LC-PCC PS rule references, listed below:

- 6.14.2 Preferred Title for a Musical Work,
- 6.14.2.3.1 Choosing the Preferred Title for a Musical Work Created after 1500,
- 6.14.2.5.1 Recording the Preferred Title for an Individual Musical Work: Omissions,
- 6.14.2.5.2 Preferred Title Consisting Solely of the Name of One Type of Composition
- 6.28.1.9 Additional Elements in Authorized Access Points Representing Musical Works
- LC-PCC PS for 6.28.1.9.1 Medium of Performance
- 6.16.1.3 Recording Numeric Designation of Musical Work
- LC-PCC PS for 6.16.1.3.1 Serial Number
- 6.16.1.3.2 Opus Number
- 6.16.1.3.3 Thematic Index Number
- 6.17.1.3 Recording Key
- 6.14.2.8 Compilations
- 6.14.2.8.4 Incomplete compilations of musical works

In addition to the above sections, Levy also explained the LC Classification for scores and LCSH for scores and the Library of Congress Medium of Performance Thesaurus for Music by giving specific examples. At the end of the session, there were some questions, and one of the questions asked was how to determine whether a score transcription of a recording was an arrangement and, therefore, an expression of the work represented by the recording. Levy's answer was based on RDA 6.18.1.4 (Arrangements, Transcriptions, Etc.), which indicates an exact score transcription of a recording (same medium of performance and not simplified or otherwise modified) would not be an arrangement.

Digital Resources Workshop -- presented by Kelley McGrath, Metadata Management Librarian, University of Oregon

submitted by Lynn E. Gates, University of Colorado, Colorado Springs

This session examined the cataloging of three types of digital resources: streaming media; blogs, vlogs & podcasts; and tangible digital resources. Kelley McGrath started the session by defining streaming media and reviewing the provider-neutral approach used in cataloging digital and electronic resources. She then went into details on all aspects of cataloging streaming media, which are also outlined in the *OLAC Streaming Media Best Practices* guide released in 2018.

Streaming media is defined as audio or video content that is being downloaded and consumed simultaneously, which means that generally there is no data kept on your local device. Streaming media, like ebooks, are cataloged using provider-neutral records (PNR). PNRs were developed to address the problem of the multitude of duplicate and near duplicate records that were in our shared bibliographic record utilities and in our catalogs. These records were causing issues for both catalogers and users. There are some ways to identify PNRs, such as a 588 Description based on note or multiple 856s. In general provider specific information, such as edition statements, access points, publication statements, access restrictions, file formats/sizes, etc. are not included

OLAC @ 40 Special Conference Section

as the information in a PNR should be relevant to all instances of the title regardless of the platform that is providing access.

After providing this background on streaming media and PNRs, McGrath moved onto the specifics of cataloging streaming media. The first thing that was discussed was that streaming media is cataloged based on the predominant content, McGrath shared examples of the Type of Record for the different forms of streaming media (music, spoken word, and video), then included how to code 006 to provide information on the computer aspects. The RDA Content, Carrier, and Media types were also explained.

McGrath's in-depth description of the digital characteristics (34Xs) was most helpful. She went through the Digital File Type, Encoding Format, File Size, Encoded Bitrate, Configuration of playback channels, Type of recording, etc. Her examples included common content for each field and where to look for the information being coded in the field or subfield, along with which fields have a standard vocabulary and which are common language.

Going through the rest of the fields that are relevant to cataloging streaming media McGrath included examples of what to do if you are cataloging provider-specific records instead of provider neutral. There were also several in-depth discussions, such as figuring out the title, what the preferred sources are for streaming media (particularly streaming audio), how to figure out the publisher/distributor, and how corporate bodies may be involved. McGrath included flowcharts that can assist in figuring out the title for both streaming video and streaming audio. For two of the greyer areas of cataloging streaming media, McGrath polled attendees to see what everyone thought. The two polls were on the Publisher and the Date of Publication and the answers sparked conversation about which options are most likely correct under the current guidelines (here are no firm answers). The final area of discussion was on accessibility content, such as captions and transcripts. This included an explanation of the different types of captions (captions for the deaf and hard of hearing vs. autogenerated captions), how to code for captions and notes to include, and whether or not caption information should be included in the PNR as sometime captions are added by individual providers with varying quality.

In moving on to blogs, vlogs, and podcasts, McGrath started by defining each and noting that there are both audio and video podcasts. Blogs and podcasts are both cataloged as continuing resources and there are many similarities to serials. For example, you will want to base the record on the first or earliest post or episode, as a podcast or blog may be ongoing; there are only specific situations where you will have a statement of responsibility; podcast episodes may be numbered; dates will need to be coded as open/closed, etc. McGrath reviewed specific fields that will be used in cataloging podcasts or blogs, such as determining the Mode of Issuance and frequency/regularity, where to look for the title, common descriptive notes (588), the statement of responsibility, numbering notes (362 & 512), dates in the fixed fields and 264, and the extent for either ongoing or ceased podcasts or blogs.

There were two parts of cataloging podcasts that are especially interesting, both because podcasts are frequently released on multiple platforms. The first is the publisher. If the creator, either an individual or an organization, hosts their own webpage they are listed in the 264 b1 as the publisher with no brackets. However, if this is not the case and you have to catalog from one of the many platforms that host the podcast you can use the platform and place it in brackets. The second thing was the URL, if you are creating a provider neutral record for a podcast you can include multiple URLs for the various platforms where the podcast is available. In addition to multiple URLs, CONSER recommends that you include the URL for the landing page of the podcast that provides access to all the episodes.

McGrath finished this section by describing what to do if you are cataloging an individual post or episode. In this case, instead of cataloging as a continuing resource, you would catalog it as a monograph. The title of the episode or post is recorded in the 245, if it has a distinctive title, with the title of the blog or podcast recorded in a 773 (Host Item Entry). If the post or episode title is not distinctive then the 245 would be built with the title of the podcast or blog in the subfield a and the episode number in a subfield n and/or p.

Finally, the session finished up with tangible digital resources such as optical discs, USB flash drives, and Playaway Views. McGrath started talking about computer optical discs by showing a wide variety of discs and what their different carrier (338) and media (337) types would be. This was followed by a discussion of the different production methods and encoding formats for optical discs and how to identify which production method was used. Throughout the discussion of optical discs there were comparisons between the different types of discs (CDs, DVDs, Blu-Ray, etc.). Optical discs, like most digital resources, are cataloged based on their predominant content, for example, if the disc contains maps than it is cataloged as a cartographic resource with an added 006 and 007 for the digital aspect. As always, if there is no other predominant content or significant aspect then you would catalog the item with a record type of m (computer file).

McGrath described the various MARC Types, Extent, Dimensions, Digital File Characteristics, and System Requirement notes. There are lots of options for all these that depend on the type of optical disc and the content. McGrath gave many examples for each area and goes through the digital file characteristics in the 347 in detail. Other in-depth examples included video games and a PDF of conference proceedings on CD-ROMs. Before moving on the flash drives, McGrath discussed where to find titles for optical discs and a variety of notes that indicate where a title was found.

USB flash drives are functionally like a computer optical disc, except for being a different shape and all of them are read/write. For the most part they are cataloged like an optical disc, but their Form is q (direct access), Media Type is computer, Carrier Type is computer chip cartridge, and the system requirement (538) should reference the need for a USB drive. McGrath also mentioned that there is a joint MLA/OLAC task force working on best practices for USB drives and other media devices.

OLAC @ 40 Special Conference Section

Playaways & Playaway Views were the final topic of discussion and seemed to have more questions than answers around the media type. OLAC's preliminary recommendation is to code the 337 as computer, while many vendors are coding the 337 as unmediated. Arguments for both sides were discussed. As with the other formats discussed, McGrath gave examples of appropriate 34X fields, 006, & 007s with the caveat that the examples follow OLAC's preliminary recommendations.

Ethical Cataloging -- presented by Violet Fox, Editor, Dewey Decimal Classification, and Gretchen Neidhardt, Cataloging and Metadata Librarian, Chicago History Museum

submitted by Jan Mayo, East Carolina University

Violet Fox began by talking about what ethical cataloging is and giving a little of its history. She asked people to give their ideas in the chat. Everyone has heard of Sandy Berman, who has long fought for better and more inclusive subject headings, but the initial discussion began a century ago, with Frances Lydia Yocom and Dorothy Porter, two librarians who felt there was not enough recognition of African Americans in the LC subject headings. Today, there is a site called CritLib.org, where this and other social justice topics are discussed. Neutral cataloging is impossible, because we all have our biases, but we can learn to recognize privilege and biases in ourselves and in our systems.

Gretchen Neidhardt oversaw an activity where the participants were asked to look at a digital image and its bibliographic record and think about the critical cataloging questions presented in the chat. The two children were described as "children with handicaps," which are not readily apparent from what we see, and what they were doing did not suggest that the presence of a disability was even relevant to the description. She discussed some changes the Chicago History Museum had made. They changed problematic subjects, such as "Illegal aliens," and tracking the changes through their authority records. They also employed person-centered descriptive language, changing terms like "Slaves" to "Enslaved persons" and "Fugitive slaves" to "Fugitives from slavery."

Fox shared a variety of additional local solutions through case studies. She encouraged petitioning to change existing subject headings or for the creation of new ones. One example she gave was Asexuality, which was rejected as not specific enough, but was eventually approved as Asexuality (Sexual orientation). Another is Afrofuturism, a term described in its LC subject authority record as "movement in literature, music, art, etc., featuring futuristic or science fiction themes which incorporate elements of black history and culture." There is also the possibility of using other controlled vocabularies to enrich records. Shifting to name authorities, she discussed a research project done at Columbia to "add the woman" back into "Mrs." headings established under the husband's name, by figuring out what the names of these women were and establishing them.

OLAC @ 40 Special Conference Section

The presenters received twenty responses to a short survey asking what kind of ethical cataloging is going on in your institution or would you like to see and what barriers to ethical cataloging are there at your institution. Frequently mentioned topics included subject headings, especially those such as “Illegal aliens” or involving race/ethnicity terms, genre terms, and authority records. Fox touched briefly on some of the barriers, saying her co-presenter would talk more about this.

Neidhardt discussed the logistics of starting such a project and potential barriers. First, analyze strengths and weaknesses of your institution and the time-sensitivity of the project. Prioritize what needs to be done. Prepare to address resistance to committing resources to the project by being able to explain the impact of not doing this work. Consider funding and staff size and explore the possibility of obtaining grants for discrete projects. Getting institutional advancement and development onboard with the importance of this work may yield alternative funding sources. Plan to make this work sustainable and use it as a form community outreach. Also, if your institution is a member of a consortium, can it work for you in these endeavors?

A second activity involved a name change in the name authority file and authorized headings because of a divorce. Should we change them if the person asks? Who should make the decision? Where should the change be made? The 100 field? The 245? The name authority record? Perhaps even the physical book? What if the author does not want cross-references between the old and new names, then what? Should our responses change based on the reason for the request to change a name?

The presenters took many questions throughout the session and closed out the program by recommending an ethical cataloging resources page, available via the [conference website](#) (login needed).

Panel Discussion: Digital Preservation of Audiovisual Materials

Presented by Michelle Hahn, Assistant Librarian and Sound Recordings Cataloger, Indiana University, Bloomington; Sarah Mainville, Media Preservation Librarian, Michigan State University, East Lansing; and Jeremy Myntti, Interim Associate Dean for Collections and Scholarly Communication, University of Utah

submitted by Wendy Sistrunk, University of North Carolina at Chapel Hill

Moderator Autumn Faulkner explained that she would pose several questions to the panelists for prepared responses, and then would open the floor for additional questions.

OLAC @ 40 Special Conference Section

Briefly describe the scope of your work and how digital preservation works at your institution.

Mainville: MSU has a collaborative policy and program which enlists the expertise of systems, facilities, acquisitions, cataloging, and digital repositories, among others. Mainville oversees the digitization of all media, which requires knowledge of best practices and entails many conversations with vendors. Preservation requires continuous actions for care and for knowing how to provide digital access. There exists an informal forum at MSU to advise on implementing local practice, in addition to regional and “Big 10” schools which work together to solve problems as a team.

Myntti: His perspective is from that of an administrator, and he doesn’t do the work on actual AV preservation. UU has a pretty robust digitization set-up partnering with other libraries around Utah and can digitize most anything. In the 1990s, digitization was completed using a scanner with no thought of preservation. Since 2008, there has been a preservation component in place. Myntti has created a digital library website making it a better user tool by creating faceting, maps, and timeline features. It also includes questions about priorities, as they can’t digitize everything. Once a collection has been identified as a candidate for digitization, they use a SMPT tool to parse the information between libraries.

Hahn: She is responsible for describing and arranging all digital sound recordings at IU. These include many unique items such as recitals, football games, lectures, etc., and are available on an Open Source platform. Hahn catalogs the stuff and does not do the actual digitization herself. IU continues to produce lots of born-digital material. They currently partner with Sony’s [MEMNON](#).

Please outline the basics of preservation metadata: What is typically included? How and where is it stored? What standards govern its application? How is it encoded? How does it operate within your library systems and repositories?

Mainville: Highly recommends the [Digital Preservation Coalition Handbook](#), which she has found to be invaluable in helping to identify Entity, Format, Event, Agent, Rights, etc.

Myntti: In 2012, UU decided to implement a system that did *not* include any descriptive metadata. This was a very bad idea, in that it made it very hard to find or migrate stuff. He recommends the [ExLibris Rosetta](#) product to help in managing a digital preservation project.

Hahn: It can be very hard to ascertain the owner of the original content, what metadata is/was included and from where. At IU, they have at least five versions of a digital object: the master, a master copy, a streaming copy, a use copy, and a backup. IU considers their library catalog to be the digital description of record. They use [METS](#), [Premise](#), and other Library of Congress standards.

OLAC @ 40 Special Conference Section

For those of us who are or may become responsible for any digital preservation work, what resources and best practices should we be aware of?

Mainville: Highly recommends [The Theory and Craft of Digital Preservation](#) by Trevor Owens. In addition, check around your own community to discover any local groups or spaces to discuss or ask questions (e.g., User Groups). Find “your people.” [Diglib.org](#) hosted a Digital Library Forum virtual conference in Nov. The Northeast Document Conservation Center ([NEDCC](#)) also hosts an annual “Digital Directions” conference, and is in general a fine resource of all sorts of information.

Myntti: He recommends the following:

- the [FACET](#) project created by Mike Casey at IU
- lists of “trusted digital repositories” (easily searchable on the web) whose mission is to provide reliable, long-term access to managed digital resources to its designated community, now and in the future
- The Digital Preservation Coalition held a conference in September, [WDPD](#)
- Additional links provided in the chat

Hahn: Check out her bibliography “[Related Content](#)”.

Additional questions from the floor:

Is there any digital preservation being done for music scores at your library?

Hahn: Yes and no. IU used to try and provide and preserve as many scores digitally as possible, but now they just focus on course reserves.

What is the format that is most volatile?

Magnetic tape, nitrate film, lacquer and glass-based discs, mini versions (CDs, DVDs, DAT tapes), etc. These formats are quite difficult to create a clean transfer. It is easiest to focus on transferring the “easy” formats (e.g. paper), because one can digitize/preserve them quickly. However, AV formats are at the most risk.

Final comments

Hahn: Be kind to yourself. You can’t be an expert on every single aspect of digital preservation. Rely on others’ expertise as they can rely on yours.

Faulkner: Feel free to contact the panelists with any additional questions.

Kits, 3D Materials, and Board Games: Cataloging Funny Formats During These Strange Times

Presented by Jessica Janecki, Rare Materials Cataloger, Duke University; Robert B. Freeborn, Music/AV Cataloging Librarian, Pennsylvania State University; and Julie Renee Moore, Special Collections Catalog Librarian, California State University, Fresno

submitted by Amy Mihelich, Cataloging Librarian, Washington County Cooperative Library Services (WCCLS), Oregon

The presenters, all members of the OLAC Objects Task Force, shared their wide experience and expertise and the audience reciprocated by keeping up a vibrant and informative chat throughout the presentations, with the presenters taking time to address questions as they arose.

Jessica Janecki began the session by covering information that would be common across the broad range of objects and realia discussed. While the MARC format and RDA were never designed for the cataloging of three-dimensional objects, the *OLAC Best Practices for Cataloging Objects Using RDA and MARC 21* gives catalogers step by step guidance on how to fill in many of the MARC fields in bibliographic records for these materials.

With a few exceptions (such as microscope slides and kits) for all three-dimensional objects the Leader/06= r for three-dimensional artifact or naturally occurring object. Janecki provided a list of the possible choices for Type of Material (TMat in Connexion) 008/33, including: toy, kit, model, microscope slide, realia, game.

As objects are not usually “published” in a way analogous to print, and some are not human-made in any way, catalogers have to use their judgment and do some research to supply a title and publication or manufacturing information for MARC field 264. Janecki provided a helpful slide delineating published vs. unpublished as it pertains to cataloging objects that are human made. Locations and dates may have to be inferred based on information gained from other sources. Making a best attempt to supply information about the location and date of production/manufacture/distribution of the object is allowed and encouraged. If a cataloger wishes to indicate that the date recorded is uncertain, a “?” can be appended to it.

The 300 field is repeatable if a cataloger has a complex object and needs to describe the details of multiple components. Measurements should be made of the object or its container. With a few exceptions, the 336 will be “three-dimensional object”, the 337 will be “unmediated”, and the 338 will be “object”, and the 340 field can be used to describe the materials used in the creation, such as textiles or metals. A general term for the form of the object (“tableware”) can be included in the 380.

OLAC @ 40 Special Conference Section

A 588 note should always be included when the cataloger has supplied the title. Additional notes can help users and other catalogers know more about the object.

Janecki works predominantly with special collections and archival materials. Her examples included unique and mass-produced items such as a tableware set, a commemorative spoon, and needlework. She often uses the Getty Art and Architecture Thesaurus as a source for genre terms.

Robert Freeborn presented next on board games. Of all the three-dimensional objects covered, board games are the most like print in that they usually have titles and publishers. Many have multiple editions and it was observed in the session chat that it appears some (“Codenames”) have franchises akin to video games and DVDs. Many games often have creators with a large enough role that they should be included in a 7XX field, although usually not a 1XX as games are collaboratively produced.

The fixed fields for board games are Type: r and TMat 008/33= g for game. The 300 field usually begins with “1 game” and should include terms used by the game designer or found on the packaging. The cataloger can then choose to list the individual components in the 300 field as well, or in a 500 note. If there are game manuals or images online, links to these can be included in MARC field 856.

For the board games where publisher information is not readily apparent from the package, Freeborn offered recommendations for online resources: Kickstarter, as it is where many board games originate; and BoardGameGeek.com, which has an extensive database of game information. When those resources are insufficient, game designers will often have a social media presence which may include information about location and years of production.

Julie Moore was the final presenter and unfortunately, due to time constraints, had to give a condensed version of her presentation. In a whirlwind tour, she covered found or naturally occurring objects (such as fossils and stones), models, microscope slides, and kits. As she put it, RDA is completely silent when it comes to naturally occurring objects, but OLAC’s best practices step up to address that gap.

The fixed fields for the types of objects in Moore’s presentation differ from other realia. Models will have TMat = q. Microscope slides TMat = p. Kits are Type = o and TMat = b. Naturally occurring objects will have an unknown date, DtSt = n, uuuu-uuuu.

Models, kits, and microscope slides are usually distributed and may come in packaging that can be used to supply a title and date and to fill in the 264 field. For naturally occurring objects, the 264 field does not apply and will not be included.

For models and naturally occurring objects, the measurements in the 300 field should be recorded in three dimensions: height, width, depth. Controlled terms exist for use in the 300,

OLAC @ 40 Special Conference Section

340, and 380 fields but if none of the available terms are accurate, a cataloger can supply their own.

The 33X fields for these types of objects will be mostly the same as those described earlier in the session, but microscope slides will have a 337 of “unmediated” as they require a microscope for use. Another exception is the 336 of “tactile three-dimensional object” which Moore described as applying to objects meant to be experienced primarily by touch, rather than visually. Records for kits may contain multiples of each 33X and 34X field for the various components.

A question was raised in the chat of when to create a new bibliographic record for a naturally occurring object and how to disambiguate among similar objects, such as geodes. Moore advised that most of the time naturally occurring objects will be unique, and the cataloger should use their judgment while making the record to reflect that uniqueness. An attendee recommended OCLC’s page on [“Cataloging Defensively”](#) as a guide.

All three presenters emphasized that catalogers working with objects should use OLAC’s Best Practices manual and catalogers’ judgment to create records that make it easier for users to find objects in the catalog.

Project Management – presented by Becky Skeen, Utah State University

submitted by Adrian Williams, University of Kentucky

Becky Skeen gave attendees a comprehensive training on the methodology of project management. Though the audience was library employees, the presentation could be helpful to any professional in need of such an overview.

In her presentation, Skeen began by defining some fundamental terms and concepts. She took the definition of a project from the Project Management Institute, an organization which sets the standards for the project management field and provides project management training and certification. The PM Institute defines a project as, “a temporary endeavor undertaken to create a unique product, service, or result.” Attendees were encouraged to visit the PM Institute’s website for further resources. Having the concept of a project defined, Skeen went on to discuss two triads of constraints that affect the process and outcome of a project. The first triad is Cost/Time/Scope, and though these constraints may change or be refined throughout the duration of a project, they should all be balanced against each other to some extent and be at least considered and given appropriate thought before a project is to begin. Layered over this first main triad is the secondary triad of Risk/Benefit/ Quality. The quality of a project should be appropriate for how much time and effort it took to deliver it, there should be a benefit to the project being done that is measurable to stakeholders, and the risks to doing the project -- if extant -- should be identified and managed.

OLAC @ 40 Special Conference Section

To extrapolate these concepts out into practice, Skeen used the example of planning a party for a family member or friend that is celebrating a milestone or accomplishment. Attendees could follow along by planning parties of their own. Skeen's hypothetical party would take place in six weeks and have a budget of \$700. The scope would be conservative, with about 30 guests, a party in the backyard, dinner and dessert being provided to guests, and a couple of party games and music. The quantifiable aspects that would measure the quality of the party were discussed, as well the benefits and risks.

Skeen then took the audience through the phases of project management, those phases being Initiation, Planning, Execution, and Closure, as well the role of a project manager and project team. She also emphasized the importance of having project management plan documentation, the benefit of such would "...define the basis of all project work."

Throughout the presentation, Skeen encouraged attendees to participate in reflective exercises. In these exercises Skeen asked guiding questions that attendees answered and discussed using Webex's chat function. She also checked in with attendees periodically, applying what theory had been discussed so far to the hypothetical party that was being planned. Toward the end of the two-hour training, Skeen and attendees discussed what project management software they had heard of or used before, and what levels of success they had experienced using them. Examples of management software included but are not limited to Trello, Slack, Airtable, and Confluence.

Skeen provided an incredibly able overview of the topic, and left attendees with a multitude of resources and information to take back to their own libraries and future projects.

Lightning Talks

submitted by Barbara Tysinger, University of North Carolina, Chapel Hill

There were seven lightning talks. All but the first speaker shared slides, but they are not currently available on the conference website.

Kristi Bergland, Music Metadata Librarian, University of Minnesota Libraries, "Developing a Workflow for Digital Score Acquisitions"

Bergland talked about the challenges involved in the acquisition of digital files of musical scores, which are then provided to patrons as print copies. She discussed the difficulties encountered when working with companies and individuals that do not always have a common understanding of one another's needs, highlighting the problems encountered when content providers are unfamiliar with the library model of acquisition and lending, and the complications which can arise in negotiations when providers are not located in the United States. The speaker said she would post a "work in progress" link on the conference website.

OLAC @ 40 Special Conference Section

Rowena Griem, Catalog Librarian for E-Resources & Serials Management, Yale University Library, “Providing Access to Individual Streaming Videos”

Griem reported on Yale’s ongoing, locally hosted streaming Media Library, which supports access to individual videos, as well as to video collections. Using the Canvas Learning Platform to serve the content, Yale Library has created a workflow with crosswalks between the various platforms used at each stage of the process. The result is an integrated, cross-departmental system which allows users access to videos from all Yale providers. Griem discussed the acquisition and cataloging process, as well as procedural documentation and the methods they have used to manage the workflow.

Kyla Jemison, Metadata Librarian, University of Toronto Libraries, “Looking at Metadata in Digital Sheet Music Platforms”

Jemison compares the metadata used by four different digital sheet music platforms. She found that each included different amounts of metadata, as well as different metadata elements. In addition, she determined that the searchability of each platform was variable, finding that in some cases only words in the title were searchable. She concluded that while these platforms are not designed with library use in mind, this does present an opportunity for librarians to contribute to improving not only the metadata provided, but also its searchability.

Nicole Lewis, Lead Cataloger, University of Utah Marriott Library, “Online Exhibits: A Call for Cataloging Guidelines”

Lewis describes cataloging of Marriott Library’s growing collection of online exhibits. Since existing guidelines for cataloging online resources do not specifically address online exhibits, catalogers turned to OCLC in search of examples from other institutions, but the records found there range widely in treatment of online exhibits, providing little guidance. Lewis then outlined the in-house cataloging guidelines they established and called for the creation of best practices guidelines for the cataloging community.

Amanda Mack, Cataloger, UCLA Film & Television Archive, “Challenges Cataloging Local News: The KTLA Tom Bradley Project”

Mack’s talk outlined the challenges encountered and strategies used in cataloging a collection of digitized local news video clips. The collection consists of “cuts and outs” (unused) video clips, with minimal accession data, and little to no information connecting the clips to the stories from which they were cut. Technology and collaboration played a large role in overcoming many of the challenges in cataloging these digitized files, allowing the cataloger to easily pause the playback and take screen shots to better analyze the content and consult colleagues and outside resources.

OLAC @ 40 Special Conference Section

Adrian Williams, Cataloging and Metadata Librarian, University of Kentucky Libraries,
“Cataloging Streaming Video at University of Kentucky Libraries”

Williams discussed the workflow developed for cataloging a collection of streaming video documentaries produced by the Appalshop community film workshop. Many of these videos were already held by the Libraries in videocassettes or DVD formats, but records were needed for the streaming versions. Using the Best Practices for Cataloging Streaming Media (Version 1.1), catalogers derived new master records or Enhanced existing records as needed.

Renate Behrens, German National Library, and **Anna Bohn**, Berlin Central and Regional Library,
“Audiovisual Resources in the German Speaking Community”

Behrens and Bohn reported on the efforts of the Working Group on Audiovisual Resources of the Committee for Library Standards (Arbeitsgruppe Audiovisuelle Ressourcen - Der Standardisierungsausschuss) in the German speaking countries, Austria, Germany, and German-speaking Switzerland. Inspired by OLAC Best Practices, they are working to develop a German language Best Practices, drawing on RDA and look forward to working with their OLAC colleagues.

Website (in German): [AG Audiovisuelle Ressourcen | RDA und Sondermaterialien](#)

OLAC Research Grant Presentation

Presented by Michelle Urberg, Metadata Librarian, ProQuest, Kelley McGrath, Metadata Management Librarian, University of Oregon, and Morag Stewart, Classics Librarian, University of Washington

submitted by Matthew Burrell, Florida State University

The grant recipients presented on the outcomes of their OLAC research grant project. Their project aims to improve access and discovery of streaming video content by improving cataloging practices and vendor education, as well as accounting for what various discovery layers and catalogs require for batch ingestion of MARC records and holdings data. Their presentation focused on a preliminary summary of results from two surveys on streaming media, one oriented around acquisitions and cataloging and the other one around discovery, to learn more about what would improve discovery/findability of streaming media by end users.

The results of their first survey, the Acquisitions and Cataloging Survey, with 69 responses, primarily came from higher education institutions (88%). The Discovery Survey was similar in the result group with 86 responses, (77% from higher educational institutions). A brief but effective review of the survey findings was highlighted in the Grant project report. The white paper on the report will be out in January with more detailed findings.

OLAC @ 40 Special Conference Section

In reference to the acquisitions and cataloging, Stewart noted were three questions that dealt with that part. The grant recipients wanted to determine what types of streaming video content were being purchased and used. Content came from a surprising number of sources (61 in total), the largest providers were names we recognize, Kanopy, Alexander Street Press/ProQuest, Films on Demand, Swank, and Docuseek2.

The first survey pointed out that the type of streaming video content was purchased or leased by collection or single title: in perpetuity (28%); subscription based (23%); and single title term license (22%).

As for the cataloging of the titles purchased, sources for the title records primarily came from the vendor and copied records. Original cataloging was also high on the list. Problems are that licenses were expiring, and patrons are losing access to the content while the record stays in the catalog. This is confusing and frustrating for the end-user. Also, there was inadequate metadata for discovery. While librarians think facets in the catalog make it easy to find streaming content, patrons find them confusing. Patrons also find that, when searching for a title, there are too many results displaying content they have little interest in finding. They may search for a title of streaming media they need but are confused by results that are not relevant. They are seeing reviews, too many links, and no real way to identify the content they are looking for.

The authors of the grant found that the most important piece of information in the discovery of streaming media is the title. The authors suggest beginning a conversation in which librarians and vendors find a common middle ground for bibliographic description.

Poster Sessions

submitted by Jan Mayo, East Carolina University

The conference featured six posters:

- 1) Can I Show This Video?: Making Public Performance Rights Visible to Patrons / Lynn E. Gates, Director of Metadata & Cataloging Services, University of Colorado, Colorado Springs
- 2) Objects, Realia, and Virtual Reality for Libraries as Specialized Method for Teaching and Learning / Cyrus Ford Zarganj, Special Formats Librarian, University of Nevada, Las Vegas
- 3) Perceptions on Aboutness of Documentary Films: Comparing FAST Headings to User-Created IMDB "Plot Words" / Christopher S. Dieckman, Metadata & Cataloging Librarian, Iowa State University
- 4) Step Up Your Game with Genre Terms for Tabletop Games / Catherine Sassen, Principal Cataloger, University of North Texas, Denton, Kevin Yanowski, Head of Cataloging and Metadata Services, University of North Texas, Denton, and Diane Robson, Games and Education Librarian, University of North Texas, Denton
- 5) Exposing Institutional Content: Preserving Legacies and Breaking Rules / Michelle Hahn, Assistant Librarian, A/AV Cataloger, Indiana University, Bloomington

OLAC @ 40 Special Conference Section

- 6) Clearing Out Backlogs from Home: Remote Cataloging of Posters / Nicole Smeltekop, Special Materials Catalog Librarian, Michigan State University, East Lansing

At the time of this publication, posters may be viewed via the [Conference Session Access](#) page (login required).

OLAC Scholarship Winners' Reports

Marie-Pier Lyonnais, Bibliothèques de Montréal

First of all, I would like to thank the Scholarship Conference Committee for the opportunity to attend the 40th anniversary OLAC Conference. I would have been thrilled to travel to Ohio for this opportunity. Unfortunately, due to the health crisis going on, the Conference could not be held in-person. I would like to congratulate the Conference Committee for the terrific work they have done with the online event.



By attending the last OLAC Conference in October 2020, I am much more empowered to help my organization updating their procedures. Being up-to-date on the RDA and to be aware of the new MARC fields of video, sound recordings and videogames is a huge asset.

I wanted to travel to Dublin, OH in order to improve my self-confidence. English is my second language and I wanted to enhance my language skills. Despite being grounded home, I am glad to have a chance at writing this report.

Even if the networking and social interactions were missing, the chat forum held during each of the presentations has been a great way to communicate with each other. The active participation to the discussion about *Kits, 3D materials and board games* presented by Julie Moore, Robert Freeborn and Jessica Janecki on October 16th was going so well that we could have forgot all about the social distancing.

Janice Bunker, Brigham Young University

I am so grateful for the scholarship I received to attend the 2020 OLAC Conference. I learned many new things, was reminded of things I already knew, and had fun!



The first session I attended was Peter Lisius's preconference session on Creating Access Points for AV Materials. I really appreciated the opportunity to see Gary Strawn's Toolkit in action. The best parts of Peter's presentations were his demonstrations—I felt like I was looking over the shoulder of a knowledgeable colleague who

OLAC @ 40 Special Conference Section

was giving me tips I will use throughout my career. It was great to be reminded about NACO policies. And I had never thought there was a NACO AV Funnel. Perhaps I should be reporting my AV names to Peter.

I next attended Tim Kiser's Basic Cartographic. In my previous job at a public library, I had to do quite a few maps, and was lucky to find a colleague (who worked at BYU) who helped me significantly. Now that I am at BYU, this colleague has retired but we still have a few maps coming in, and I am on the list of those who may be tapped to catalog them. Tim's presentation cleared up some points for me and refreshed my memory of some other points. I'm excited for the slides to be posted, because I was unable to attend the second Cartographic session.

In the afternoon of that day, I attended Mary Huismann's presentation on audio recordings. Over half of my job involves cataloging audio recordings, so Mary's tips will be very useful to me every day.

Jay Weitz's session on video cataloging was also great—cataloging video comprises the remainder of my job description. Jay's explanation of franchise titles was very helpful, and the rest of his session was a great reminder of things I sometimes forget to do.

One of the sessions I was most looking forward to was Kelley McGrath's. Although I'm not currently cataloging streaming media, our School of Music performances are no longer being produced as CDs. At some point (probably sooner than I'd like), I will be cataloging the digital files that we will be placing in a streaming service. I learned also that I will need to be conversant with the Provider Neutral guidelines, which to this point I have only heard snippets about.

In this same vein, the panel discussion on digital preservation was timely. That is another area that seems to be looming on the sidelines in our department, since our digital preservation cataloger passed away unexpectedly earlier this year.

And then, to my favorite of all the sessions –Jessica Janecki, Robert Freeborn, and Julie Moore! First, they seem like such fun people. Second, their presentations were well done and very informative, in addition to being interesting and amusing. And cataloging the weird stuff is something I miss from my previous job. Although I've never cataloged a Smilodon tooth...

The opening session was great, even though I didn't win any games. I got to see my name on a slide (third time ever), and the toasts were awesome. If I could sum up my first OLAC conference in one sentence, I would do a mash-up quote from Julie Moore: "In this quilting bee of catalogers, I have found more of my people!" (I can't just say "my people", because then MOUG would feel left out...)