2022

OLAC NEWSLETTER

THE OLAC NEWSLETTER

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

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

NEWS & ANNOUNCEMENTS EDITOR
Meg Wang
Mississippi State University Libraries
P.O. Box 5408
Mail Stop 9570
Mississippi State, MS 39762
mwang@library.msstate.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

From the Editor

Laura Kane McElfresh

Hello, OLAC Members! In this issue, the *OLAC Newsletter* welcomes some new contributors: our Secretary, Amanda Mack; and our Advocacy/ Outreach & Membership Coordinator, Tanesa King. (Next time Nerissa Lindsey will come on board as Acting/Interim Treasurer; thank you especially to Jennifer Eustis for one final Treasurer's Report, and to all our outgoing officers and Newsletter contributors for your work on behalf of OLAC.)

With ALA's transition to [LibLearnX](#) (in New Orleans this January 27-30) and retirement of the Midwinter Meeting, effective last year, OLAC has opted to institute a virtual wintertime membership meeting. While many members (including me!) may miss getting to see each other in person, we hope that the virtual format is more accessible to more people, including members who may not have been able to attend Midwinter and will not attend LibLearnX. Please watch OLAC-L for a scheduling announcement when dates have been set for our Board and/or Membership meetings.

Contents

From the President

Scott Piepenburg

With the arrival of winter (at least on the calendar) "normal life" is back in full swing, soon to be upended by holidays, breaks, travels, end of year (calendar, at least) projects and other interruptions. Most academic programs have settled into a rhythm, public libraries are deep into their school-support programs as well as fine-tuning delivery methods developed during the COVID pandemic. Special libraries too are being pressed for resources. We often forget about special libraries, but they serve a vital function, be they part of a corporation, a medical library, a law library, or other specialized service. Having been a member of Special Libraries Association for a few years, I am sympathetic to the challenges they face, many a OPL (one person library.)

OLAC has also been moving forward. We have finally stabilized the treasurer position and devised a more stable path to fill and support this position. There have been a few legal details to work through, but thanks to electronic signatures and scanning devices, they have been taken care of.

Regarding people, Tanesa King has come onboard as our Outreach-Advocacy & Membership Coordinator. She has hit the ground running, making certain that information about OLAC gets spread through as many channels as possible, and leveraging the new membership options to not just increase membership, but to increase the diversity and depth of the membership. If you are every doing a presentation on anything AV, please reach out to her at tanesa.king@unt.edu and she will be glad to work with you with information that you can share with others about OLAC and what it has to offer.

We have also re-configured our membership paths. The institutional membership has been eliminated since we found few takers and realized it was at time difficult for librarians working in those libraries to take full advantage of the benefits of being an OLAC member. Another change is that we have added two new categories; one for unemployed librarians to accommodate those who may have gone through a downsizing or other contraction, another is a free subscription for students, capped at a two-year limit. We made this change in an effort to "capture" future librarians and make them aware of OLAC and how it can contribute to their professional growth and possibly induce more prospective students to choose a path in cataloging. As an accidental librarian (I was originally studying history) who fell in love with cataloging in his first class, and then really "swooned" when I took AV cataloging, I would have loved to have known about an organization like OLAC while still a student.

We still have openings and are looking for participants for the OLAC NACO-AV funnel project. In a nutshell, this project helps focus on those headings and participants, both personal and corporate, in the AV world. The creation of authority records helps leverage the knowledge multiple times to multiple libraries. As someone who has been involved in the design and maintenance of library systems, I see daily how critical good authority control is to the goal of every user finding their item, and every item finding its user.

As an organization, OLAC is here to help and support you as you work to support your user base. The resources on the website and committees, as well as the OLAC list, are all designed to propagate information from those who have had similar situations in the past, to the profession at large so that we all may benefit from particular experiences. Please consider getting involved in OLAC, be it running for office or serving on a committee. The time commitment isn't that great, and it is very rewarding when you can step back and look at a completed project and say, "I was a part of that." That is what we, as librarians do; share the knowledge and information we have with others to benefit everyone.

From the Editor

(continued from p. 3)

Also on the conference and continuing education side, ALA's free, virtual Core Interest Group Week will take place this coming March 6-10. So, in the absence of our ALA Midwinter "Meetings of Interest" feature, I hope to bring you a "Core Interest Group Week" guide in the March *Newsletter* issue. If you are interested in reporting on an Interest Group Week session – or any other conference session of interest to the OLAC audience – please contact me or our Conference Reports Editor, Jan Mayo.

Finally, as always, OLAC needs your participation, leadership, and ideas! Please see Page 18 for information on opportunities to run for OLAC elected office; or contact any of the Board members for information on appointed positions and liaisonships, mentioned in Amanda's Board meeting notes (pages 7-8). Or, if you would like to suggest topics for a future Coffee Talk or a more formal training session – or share your expertise by leading or co-leading one – please get in touch with Tanesa.

With best wishes for a safe and happy holiday season,

-Laura

From the Secretary

Amanda Mack

OLAC Executive Board Meeting
September 14, 2022
2:00 PM (EDT)
Via Zoom

Present: Bryan Baldus, Emily Creo, Jennifer Eustis, Sarah Hovde, Ann Kardos, Tanesa King, Nerissa Lindsey, Amanda Mack, Laura McElfresh, Scott Piepenburg, Jay Weitz, Alex Whelan

- Treasurer Vacancy and Appointment
    - Alex will run for the Treasurer position for the term July 1, 2023 to June 30, 2025 in our 2023 election.
    - The OLAC Board appointed Nerissa Lindsey to be Acting/Interim Treasurer for the term September 15, 2022 to June 30, 2023. Nerissa steps in to replace Kurt Hanselman who stepped down from the Treasurer position. The OLAC President will send Nerissa a letter, confirming her appointment.
- Outreach-Advocacy and Membership Coordinator
    - Tanesa will be taking over this role on October 1; she and Ann will be overlapping in this month to transition the role
    - Julie Moore will be giving a Coffee Talk on Critical Cataloging on October 11. There will be a limit to 30 people like last time. The announcement should go out over email tomorrow and registration will be open for two and a half weeks.
- Newsletter publication schedule
    - It would be nice to have the newsletter publication align with the fiscal quarters so the Treasurer's Report would be more timely. Currently, they are a couple months out of date.
    - Potential complications are it could mess up the timing for elections and announcements for conferences.
    - Laura will look into this and email the Board with options to discuss in more depth at the next meeting.

- Student membership
  - OLAC currently offers a discounted one-year membership rate of $20.00 for students. Should we offer free membership for students as a way to potentially broaden our membership?
  - As per Jennifer we're in good financial standing and could afford to do this; currently we have 216 members and only 8 of those are students.
  - Tanesa can publicize this when she has specifics, maybe in conjunction with advertising virtual events, and potentially reach out directly to library schools and over OLAC-L for subscribers to forward to their networks.
  - No objections from the Board to free student membership; this would not need a bylaws change since there is already a student membership tier.
  - Tanesa, with Nerissa's help, will draft a document about guidelines, stipulations etc. and email it to the Board for comments and future discussion.
- OLAC Zoom account
  - Currently we are using Board members' institutional accounts and having an official OLAC Zoom account for events could be beneficial.
  - Nerissa will look at the cost for future discussion.
- Research Grant/Diversity Scholarship
  - It might be a good idea for OLAC to offer a diversity grant/scholarship similar to the one currently offered by MOUG.
  - The current research grant is out of date and geared towards people who have the opportunity to do research which is a fairly small number in our field; the funds might be better utilized in the form of a scholarship instead.
  - Emily will form an ad-hoc committee to explore the specifics: what's the award for? How do you market it, etc. Laura and Nerissa volunteered to serve on the committee; Emily will put out a call for additional volunteers on OLAC-L if needed.
- Institutional membership
  - This is no longer an option on the website for new membership or renewals.
  - We still have a handful of institutional members that will be phased out as their current memberships expire; they will be reminded by email that an institutional membership is no longer offered.
  - If anyone pays by check rather than through Wild Apricot, the check will be returned with a note.

Adjourned at 3:00 PM (EDT)

OLAC Executive Board Meeting
November 9, 2022
3:00 PM (EST)
Via Teams

Present: Bryan Baldus, Jennifer Eustis, Sarah Hovde, Nerissa Lindsey, Amanda Mack, Laura McElfresh, Scott Piepenburg, Jay Weitz, Alex Whelan

- Board Member Reports
    - Treasurer: Nerissa now has access to Chase and has had her first round of training. A second round is coming up and all is going well.
    - Newsletter: Reminder, newsletter submissions are due November 30.
- Coffee talk (email report from Tanesa who could not attend the meeting):
    - Have surveys been done for past coffee talks? If so, are there certain questions that should be asked?
    - Tanesa would like to continue with Coffee Talks and do another in the spring, possibly April. She is going to send an email to OLAC membership soon to see if anyone would like to give a future coffee talk. Does the Board have any ideas or volunteers for the next one?
- Newsletter Publication Schedule
    - Laura looked through the Bylaws & Handbook for time-sensitive events in the OLAC year. Moving the publication schedule from Mar/June/Sep/Dec to Apr/July/Oct/Jan will bump up against election deadlines and ALA Annual related things.
    - Trying to adjust the newsletter schedule will be complicated. The Board agreed it's best to leave it as is, and the Treasurer's report will just have a slight lag. Also, the Treasurer no longer has access to membership information, so if this is needed in the Treasurer's report, it will need to come from the Membership Coordinator.
- Handbook
    - CAPC applications have typically been due in March, but the handbook indicates a January deadline. Does this need to be changed?
    - Handbook revisions are the duty of the Secretary. Amanda has been looking at the handbook and plans to start revising it early next year. She will be in touch with Alex and Sarah regarding anything CAPC related in the handbook.

- Free Student Membership
  - Jennifer was given the OK in this meeting to make the change in Wild Apricot to offer a 2-year, non-renewable free student membership. Once it's live, she will alert Tanesa so Tanesa can do outreach.
- Diversity Scholarship
  - Emily will be sending out a Doodle poll to the taskforce to set up a meeting time to take place after Thanksgiving.
- OLAC Liaison Vacancies
  - NACO AV Funnel Coordinator: Previous coordinator, Peter Lisius passed away and CAPC is investigating what to do with the funnel. They have reached out to different people and organizations, and no one is stepping up to run it, but no one seems ready to end it either. CAPC will discuss it at their January meeting and provide a recommendation to the OLAC Board after that.
  - NACO AV Funnel Assistant Coordinator: this position is also vacant, but will depend on what happens with the Coordinator position.
  - MOUG Liaison: Autumn is no longer an OLAC Member and on maternity leave; we need a new MOUG Liaison.
  - News and Announcements Editor: Meg Wang took over with the Summer 2022 issue. Laura will get Meg's contact info to Jennifer for the website.
  - Book Review Editor: Laura has not seen a request for a book review since she started as Newsletter Editor; the most recent one she found was from June 2017. It's not clear how books would come to us for review, and volunteers are difficult to come by. The Board decided to retire this position with no objections.
  - OCLC Global Council: This had been John DeSantis, but he is no longer on the Global Council as of October 2021.
    - The role started as an initiative to share information from the Global Council which came from then OLAC President Jeremy Myntti. (OLAC happened to have people who were on the Global Council at the time.)
    - Replacement liaison would probably be a similarly informal appointment.
    - Amanda will reach out to Tanesa to check the Global Council membership to see if any current member is also an OLAC member. The role has been vacant since 2021 without anyone commenting. If an OLAC member isn't on the current council, we can retire this position.

- Institutional memberships
  - It was reaffirmed that institutional memberships are no longer being offered. A reminder should be sent out, and any checks will be returned with a notice that this type of membership is no longer being offered.
- Unemployed membership rate
  - The Web Steering Committee (WSC) discussed the idea of having a discounted rate for those members who are unemployed. The Board agreed to implement an annual, non-renewable membership for $20 (half the current annual fee) for unemployed members.
- Student engagement
  - Can we enlarge the OLAC mentoring idea to include working and mentoring with students?
  - This discussion topic was tabled since the Outreach-Advocacy & Membership Coordinator, Tanesa, was not present at this meeting.
- Members directory
  - Currently the members directory is only available to members who are logged in to our site. Do we want this information to be public? If so, do we ask members to review their information and opt out of this if they don't want their information to be displayed publicly.
  - It was decided not to make this information publicly available to make it less likely to be harvested etc. People tend to use OLAC-L as a way to connect, rather than through the website.
- OLAC Award of Excellence
  - The Web Steering Team has proposed an OLAC Award of Excellence. Many organizations have awards for excellence or those who are doing amazing work. Should OLAC have a similar award?
  - We already have the Nancy B. Olson Award. How would this be different?
  - Board agreed to keep the focus on the Nancy B. Olson award at this time.

Adjourned at 3:54 PM (EST)

Online Audiovisual Catalogers Inc FY 2022
Treasurer's Report
07/01/2022 - 09/30/2022

OLAC Quarterly Treasurer Report

Membership	Income	Expenses	Year to Date	Net Budget	More/-Less
Membership Dues	$1,945.00	-	$1,945.00	$6,000.00	-$4,055.00
Membership Due Refunds	-	-	-	-	-
Membership Totals	**$1,945.00**	**-**	**$1,945.00**	**$6,000.00**	**-$4,055.00**

Sponsorship	Income	Expenses	Year to Date	Net Budget	More/-Less
Donations	-	-	-	-	-
Donation Refund	-	-	-	-	-
Sponsorship Totals	**-**	**-**	**-**	**-**	**-**

Administrative Expenses	Income	Expenses	Year to Date	Net Budget	More/-Less
ALA Affiliate Membership Fee	-	-	-	-$150.00	$150.00
Awards Fees	-	-	-	-	-
Credit Card Service Fees (Wild Apricot - Affinipay)	-	$48.43	-$48.43	-$100.00	$51.57
Bluehost Subscriptions	$1,079.28	$1,079.19	$0.09	-$300.00	$300.09
Mailing and Postage Fees	-	-	-	-$200.00	$200.00
Memorial Library University Archives Fee	-	-	-	-$100.00	$100.00
Office Supplies	-	$65.86	-$65.86	-	-$65.86
Wild Apricot Software Subscription	-	-	-	-$1,188.00	$1,188.00
You Need a Budget (YNAB) Subscription	-	-	-	-$98.99	$98.99
Newsletter Editor Stipend	-	$50.00	-$50.00	-$200.00	$150.00
Website Coordinator Stipend	-	$50.00	-$50.00	-$200.00	$150.00
Money Minder Subscription	-	$185.86	-$185.86	-$190.00	$4.14
Business Bank Account Fees	-	$4.00	-$4.00	-$10.00	$6.00
Administrative Expenses Totals	**$1,079.28**	**-$1,483.34**	**-$404.06**	**-$2,736.99**	**$2,332.93**

ALA Conference Affiliated Events	Income	Expenses	Year to Date	Net Budget	More/-Less
Board Member Attendance Stipend	-	$100.00	-$100.00	-$1,000.00	$900.00
Board Members Dinner	-	-	-	-$450.00	$450.00
Membership Social Hour	-	-	-	-$350.00	$350.00
ALA Conference Facilities (Room) Fees	-	-	-	-	-
ALA Conference Facilities (A/V) Room Set Up Fees	-	-	-	-	-
ALA Conference Affiliated Events Totals	**-**	**-$100.00**	**-$100.00**	**-$1,800.00**	**$1,700.00**

OLAC Conference	Income	Expenses	Year to Date	Net Budget	More/-Less
Conference Registrations	-	-	-	-	-
Conference Registration Refunds	-	-	-	-	-
Preconference Registrations	-	-	-	-	-
Preconference Registration Refunds	-	-	-	-	-
Conference Assistive Technology Fees	-	-	-	-	-
Conference Facilities (Room) Fees	-	-	-	-	-

OLAC Conference	Income	Expenses	Year to Date	Net Budget	More/-Less
Conference Facilities (A/V) Room Set Up Fees	-	-	-	-	-
Conference Board Members and Liaisons Stipends	-	-	-	-	-
Conference Scholarship	-	-	-	-	-
Workshop Leader Honorariums	-	-	-	-	-
Keynote Speaker Honorariums	-	-	-	-	-
Conference Hotel Fees	-	-	-	-	-
Conference Catering	-	-	-	-	-
Conference Badges and Badge Holders	-	-	-	-	-
Conference Transportation	-	-	-	-	-
Conference Photocopying Fees	-	-	-	-	-
Conference Folders	-	-	-	-	-
Presenter Travel Reimbursement Fees	-	-	-	-	-
Conference Reception Event Catering	-	-	-	-	-
Conference Reception Event Facilities (Room) Fees	-	-	-	-	-
Conference Reception Event Facilities (A/V, Band, etc.) Fees	-	-	-	-	-
Conference Badge Laynards	-	-	-	-	-
Conference Poster Board Fees	-	-	-	-	-
Conference Personal Sponsorships	-	-	-	-	-
Conference Vendor Sponsorships	-	-	-	-	-
OLAC Conference Totals	-	-	-	-	-

Workshops	Income	Expenses	Year to Date	Net Budget	More/-Less
Workshop Registrations	-	-	-	-	-
Workshop Registration Refunds	-	-	-	-	-
Workshops Totals	-	-	-	-	-

Grand Totals					
	$3,024.28	-$1,583.34	$1,440.94	$1,463.01	-$22.07

Bank Account Balances	07/01/2022	09/30/2022	Last reconciled
Chase Bank	$51,260.01	$52,700.95	Never
Totals	**$51,260.01**	**$52,700.95**	

Review Reconciled Bank Statement Reports along with this Treasurer's Report to ensure its accuracy.

Summary for the Period		
Starting Total		$51,260.01
Income	$3,024.28	
Expenses	-$1,583.34	$1,440.94
Ending Total		$52,700.95

Submitted by:

Name: _Jennifer Eustis_____ Signature: __*Jennifer M. Eustis*_____ Date: ___10/03/2022___

From the Outreach/Advocacy & Membership Coordinator

Tanesa King

Hello OLAC,

This is my first column as your new Outreach/Advocacy & Membership Coordinator. I have never served in an officer position quite like this, and I'm excited about plans for 2023! This past October, Julie Moore gave a great Coffee Talk on critical cataloging. Thank you, Julie, for sharing your expertise, and thank you to Ann Kardos, who helped me facilitate the talk, and who gave me a great orientation for how to serve in this position. The next Coffee Talk will likely be in the spring of 2023, and I will be sending out an email soon to ask if anyone has ideas for it. In addition, I will also be sending out a call for volunteers for our "All in a Day's Work" column for the newsletter. This is a column where our members can write short and sweet articles about their jobs or interesting projects they are doing. In the last newsletter, Amanda Mack, our new secretary, wrote about her work at the UCLA Film & Television Archive.

For 2023, we will also be continuing on with our mentoring program. I am going to be checking in with current mentors/mentees, and I will also put out a call for people who need mentors or who would like to serve as a mentor. Please let me know if you're interested!

In other news, OLAC recently made some changes to our membership levels—student memberships are now free for 2 years! If you have any library school students in your life, be sure to let them know we are offering free memberships. Also, we have a new membership level for unemployed individuals, and that one is $20 for a year. I'm so happy that OLAC can offer this!

I have really enjoyed serving OLAC so far, and I am so grateful for the kind and helpful people I've met through our group. I didn't want to forget to thank Jennifer Eustis, who has given me great training on how to use the administrative side of our website. Her help has been invaluable, and she is always willing to answer my questions when I have them. I think that's about it for now! I hope you all have a safe, happy, and restful holiday season.

Best,

Tanesa King

News and Announcements

Meg Wang, Column Editor

ALA Best Practices for Cataloging Comics and Graphic Novels Now Published

Best Practices for Cataloging Comics and Graphic Novels Using RDA and MARC21 is available to view and/or download at http://hdl.handle.net/11213/18623. This document covers descriptive and subject/access point cataloging of comic books, manga, graphic novels, and webcomics with examples from actual comics cataloging.

Call for Volunteers! A new NACO/SACO Comics and Fiction Funnel is Seeking New Members

The Funnel improves access to comics and fiction by promoting the creation and revision of name, title, subject, genre, and demographic authority records related to those areas. Additionally, the Funnel works as part of the Library of Congress Program for Cooperative Cataloging (PCC) to develop best practices, changes, and clarifications for NACO and SACO rules and procedures. The Funnel also provides input and guidance for all interested in comics and fiction cataloging. If you have questions about joining the Funnel, please feel free to email GNCRT Metadata and Cataloging Committee co-chairs Deborah Tomaras (Deborah.Tomaras@marist.edu) or Allison Bailund (at abailund@sdsu.edu). The deadline to fill out the Volunteer Form (https://forms.gle/snkjSQSf5E8fKWtX8) is 12/02/22.

RBMS Descriptive Cataloging of Rare Materials (RDA Edition) (DCRMR) Now Published

DCRMR is one of several manuals providing specialized cataloging rules for various formats of rare materials typically found in rare book, manuscript, and special collections repositories. Together, these manuals form Descriptive Cataloging of Rare Materials (DCRM), an overarching concept rather than a publication in its own right. The recent release of version 2022.2.0.0 of DCRMR contains instructions for cataloging rare books only. The manual will eventually incorporate instructions for other rare materials formats, beginning with graphics.

Free Webinar on User-Centered Cataloging

This webinar is fully booked but the recordings will be available later. Katie Retterath Martin, Raedial Founder, will present a three-series webinar on user-centered cataloging the first three Mondays of December 2022. Each webinar will be 45 minutes, offer a deep dive into different aspects of user-centered cataloging, and provide free resources for all attendees.

- *Part 1: Understanding User Experience*
  Monday, December 5, 2022, from 11:30am-12:15pm CST
- *Part 2: Community Education*
  Monday, December 12, 2022, from 11:30am-12:15pm CST
- *Part 3: Promoting Access to Your Collections*
  Monday, December 19, 2022, from 11:30am-12:15pm CST

Call for Proposals! "Equity, Diversity, and Inclusion in Cataloging and Technical Services" Online Conference, February 2023

Libraries across the nation created and launched many Equity, Diversity, and Inclusion (EDI) initiatives in recent years. This Amigos Library Services online conference will examine EDI in action today in cataloging and technical services. For more information about this conference visit www.amigos.org/EDI-2 . If you are interested in sharing your knowledge and experiences, please submit your proposal by December 9th, 2022: https://forms.office.com/r/6gX4y7cfHi .

MUSIC OCLC USERS GROUP

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: treasurer@musicoclcusers.org Please email for a physical mailing address.

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

In the Spotlight with... Tanesa King

Lisa Romano, Column Editor

Tanesa King recently became OLAC's outreach-advocacy and membership coordinator. She is currently a cataloging librarian at the University of North Texas (UNT), where she primarily catalogs DVDs/Blu-rays, art books and exhibition catalogs, and various e-book packages. Just at UNT for six months, Tanesa is hitting the ground running and getting started on some interesting projects: researching the library's collection of resources on women's health and reproductive rights, finding ways to provide better subject access to these resources, and aiming to add resources to the collection. Also, she is enhancing their procedure on art book cataloging, presenting on the procedure and common issues encountered when cataloging them, and participating in the library's next Human Library event as a cataloging liaison.

And what does Tanesa most enjoy about her job?

> *I enjoy cataloging the art books most of all and love cataloging graphic novels and comics when I get the chance. I have never considered myself an artist, but I enjoy graphic art so much, and it keeps the cataloging interesting when you get to catalog things like this. One thing that is difficult, though, is having to break away from one book in order to move onto another because we do need to be productive, after all!*

Tanesa considers being hired for her current position an important achievement.

> *It is my first position as a faculty librarian, so not only do I get to continue cataloging almost daily, I also get to pursue my service and scholarly interests. I work in a good department with caring, functional people, and I look forward to going to work on most days.*

Her first library job was volunteering at the Carnegie Public Library in her hometown of Vernon, Texas. Tanesa was in high school and did volunteering projects with the National Honor Society. Though not on their list of project ideas, Tanesa approached the librarian and asked if she would be willing to have Tanesa help her out a couple of times a week. *We were in a small town, so it did seem like most of the time she was on her own, and I think she was glad to have the help.* Tanesa assisted with shelving books, shelf reading, and checking out/in books. Plus, she had fun

creating genres for the videocassette collection and getting it organized. Possibly a sign Tanesa was meant to be a cataloger!

Even with that experience, Tanesa didn't go to college knowing that she wanted to be a librarian, but everything just fell into place. She was working on her bachelor's degree in Theatre at Texas State University, and got a student worker position at their Alkek Library - first in Reference/ILL and then in monographs cataloging, and really enjoyed the work. After graduating, Tanesa didn't really know what she was going to do. A little while later, she got a temporary position in Acquisitions at the Alkek Library. Then after a few months, she was hired for a permanent library assistant position in Serials Cataloging.

> *It was about midway through my six years in Serials that I realized I'd found something I really enjoy, and why not get my degree in it so I can keep doing it? So, I got my degree after that.*

During her career, Tanesa has worked on some interesting projects. While at the Alkek Library, she was the cataloger for the University Archives for two years. They had several interesting objects and items from Aquarena Springs, which at the time was an educational center that was part of the university. However in its early days, it was more of an amusement park. Many of the objects came from its amusement park days—a giant pig costume, many photographs of their underwater performers, and an old scrapbook. The scrapbook had been in a building that had flooded, and the pages were water damaged and dirty, and full of newspaper clippings. The Archives decided to preserve the scrapbook by scanning and photocopying it. Tanesa oversaw indexing it and recording all the news article titles because the Archives wanted to provide subject access to the scrapbook since they were taking the time to salvage it.

> *And there were some interesting and horrible titles on those clippings—write-ups about Ralph the swimming pig and a goat that liked to eat cigarettes.*

Additionally, Tanesa worked on another challenging project at the Weatherford Public Library in Weatherford, Texas. As part of a grant, the library conducted oral history interviews with former students of the Mount Pleasant School in Weatherford. This was a school for African American students that had existed when segregation was still occurring in Texas.

> *It was quite a project and one I am proud of because I had to step outside of my comfort zone of cataloging to do it. I researched the school and the students and teachers, reached out to the former students to ask for interviews and permission to make the interview content available in the catalog, I wrote the interview questions, I conducted the interviews, and I cataloged the interviews. It was also humbling and eye-opening to speak to the interviewees and learn what they went through at that time in history.*

While in in graduate school for library science, Tanesa first heard about OLAC. She did not join right away because she was not heavily involved in non-book cataloging. *During the pandemic, though, I was looking for a group I could get involved with; at the time, I really needed more interaction and networking with other librarians.* Tanesa discovered that OLAC was offering an online conference with all the different cataloging workshops, and that seemed like a great way to see what the group was like. *I thought the conference was great, and I've really been happy to be involved with OLAC and am excited to be your new membership coordinator and outreach officer.* In addition, Tanesa is participating in the mentorship program as a mentee, interacts with OLAC's resources, and since she is a DVD/Blu-ray cataloger, refers to the Best Practices quite often.

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

> *One thing that has been a constant through my career, even going back to my first library job, is learning. I have seen so many things change in libraries—library systems and catalogs, types of materials we catalog, cataloging rules, subject headings, the way we access information. There is so much change, and I don't think there is any way I could have kept afloat if I hadn't continued to learn, to attend classes and conferences, and to go to trainings. And learning is also how I have kept my spark and stayed interested in this position. I have found things that I have passion about and that make my job fun. Continuing to learn has also helped me find research interests and things that I want to do to help serve our library users. So my advice would be to keep learning!*

OLAC Elected Leadership Positions: Call for Nominations

OLAC is 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. Feel free to contact incumbent officers for more information.

All OLAC personal members are eligible to serve, and self-nominations are highly encouraged. If you would like to nominate an OLAC colleague, please be sure that person is willing to serve.

Members of the Executive Board receive a $100 stipend for attending OLAC Membership meetings during ALA conferences and the OLAC Conference. The deadline for nominations is December 31, 2022. Please submit requested nomination materials in electronic form to Kristi Bergland (bergl007@umn.edu).

OVERVIEW OF DUTIES

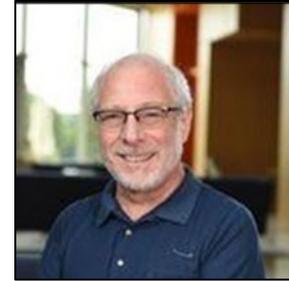**Vice President/President-Elect**

This office is elected annually, with a term beginning in the summer following the ALA Annual Conference, serving for 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 President Emeritus. 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 Immediate Past President may also be assigned to take on additional projects. The President Emeritus (adjunct to the Executive Board) serves as the Chair of the Elections Committee.

Treasurer & Assistant Treasurer

OLAC is seeking volunteers to run for Treasurer or Assistant Treasurer. The Treasurer is responsible for OLAC finances, providing quarterly reports to the Executive Board, and filing taxes. The Assistant Treasurer helps the Treasurer with their responsibilities, and then becomes Treasurer for the second year of the two-year term. This is an exciting way to give back to your profession and be part of a fun and welcoming Board.

News from OCLC

Compiled by Jay Weitz

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.

WorldCat, Cataloging, and Metadata

WorldCat Validation Installation, September 29, 2022

The September 29, 2022, installation of WorldCat Validation involves the following new features, enhancements, and bug fixes.

- New Features and Enhancements:
    - OCLC-MARC Validations of New MARC Codes Announced May-August 2022
    - MARC 21 Bibliographic Update No. 34 (Announced July 2022)
    - MARC 21 Authority Update No. 34 (Announced July 2022) to the Validation Rule Set that Includes All Valid Elements of MARC 21 Authority Format
    - MARC 21 Holdings Update No. 34 (Announced July 2022)
- OCLC Encoding Level K Now Invalid in WorldCat
- Bug fixes:
    - Correction of Validation Relationships in Bibliographic Field 382
    - Unicode Characters Valid in Additional Local Holdings Record (LHR) Subfields
    - Correction of Validation for Authority Fields 080, 082, and 083
    - Correction of Validation for Bibliographic Field 046
    - Correction of Validation for Subfield $2 in Bibliographic and Local Holdings Records (LHRs)

These enhancements and fixes are the result of announcements of new MARC elements and codes by the Library of Congress as well as feedback and requests from members of the OCLC community. Full details are available in the WorldCat Validation Release Notes, September 2022.

WorldShare Collection Manager Installation, November 15, 2022

The November 15, 2022, installation of WorldShare Collection Manager provides new features and enhancements including:

- Addition of a Title History Accordion at the Collection Level
- Local Data Preservation

Full details are available in the WorldShare Collection Manager Release Notes, November 2022.

WorldShare Record Manager Installation, November 12, 2022

The November 12, 2022, release of WorldShare Record Manager provides one new feature to My Labels. This new feature will help you manage your workflows for label printing:

- A new content type Enumeration/Chronology has been added to select in Label Templates to allow you to print enumeration, chronology, and textual holdings data from 86X fields in Local Holdings Records (LHRs) on your labels

Full details are available in the WorldShare Record Manager Release Notes, November 2022.

Resource Sharing Services

Québec Universities Move Library Resource Sharing to OCLC's Tipasa

Member libraries of the Partenariat des bibliothèques universitaires du Québec (PBUQ), a partnership of Québec university libraries, are now using OCLC's Tipasa interlibrary loan management system to serve 18 Québec member universities. Tipasa is the cloud-based interlibrary loan management system that makes it possible for libraries to manage a high volume of interlibrary loan requests, automate routine borrowing and lending functions, and provide an improved experience for students and faculty. In 2020, Québec university libraries implemented OCLC's WorldShare Management Services (WMS), the cloud-based library services platform with WorldCat as its foundation, which allows library staff to draw on OCLC's shared data network and technology. The Tipasa interlibrary loan management system integrates with WMS for more efficient workflows. Tipasa is the best solution to migrate to from its VDX ILL application. Tipasa offers the best automated functionality deemed essential by the partnership. Tipasa automatically sends various pre-configured messages to users in response to ILL requests. And for Canadian academic libraries outside of Québec, Tipasa creates an automated lender string using the partner's knowledge base if this knowledge base is available in WorldShare. Tipasa is the only interlibrary loan management system that offers an interface in French, both for users

and for staff. And Tipasa is compliant with Canadian copyright requirements. More about OCLC resource sharing is on the website.

RelaisILL Installation, September 22, 2022

The September 22, 2022, release of Relais provides many new features and enhancements in addition to numerous bug fixes. Full details are available in the RelaisILL Release Notes, September 2022.

WorldShare Interlibrary Loan Installation, October 16, 2022

The October 16, 2022, installation of WorldShare ILL provides new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- More efficiently build lending automations with more detailed error messaging
- Coming soon: Streamline off-system requesting with partner records
- Coming soon: View the Article Exchange interface in French

Full details are available in the WorldShare Interlibrary Loan Release Notes, October 2022.

Tipasa Installation, October 16, 2022

The October 16, 2022, installation of Tipasa provides new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- More efficiently build lending automations with more detailed error messaging
- Coming soon: Streamline off-system requesting with partner records
- Coming soon: View the Article Exchange interface in French

Full details are available in the Tipasa Release Notes, October 2022.

Discovery and Reference Services

New WorldCat.org Connects Genealogy Enthusiasts, Educators, and Historians to the World's Libraries

For genealogy enthusiasts, educators, and historians, the new WorldCat.org offers an improved experience to uncover family lineages and investigate historical events. By exploring the billions of library resources from more than 10,000 libraries worldwide represented on WorldCat.org, users can find an unparalleled pool of genealogical information. As more and more hobbyists

and professionals alike seek to learn about the stories that precede and interweave with their own, WorldCat.org has a breadth and depth of information that can't be found anywhere else online. Through WorldCat.org, people can identify a variety of source materials in libraries around the world, including:

- Newspapers
- Photographs
- Family Bibles, church histories, and records
- Cemetery and burial records
- Military records
- Town histories and probate records
- General genealogical resources, such as directories, handbooks, and magazines
- Slavery and antislavery materials, including slave records
- Indexes of births, marriages, deaths, wills, and obituaries
- Microfilmed genealogy and local history collections

FamilySearch has been working with OCLC to not only expand access to FamilySearch's vast catalog of genealogically rich records from all over the globe, but to introduce FamilySearch patrons to WorldCat.org's vast offerings online. WorldCat.org is a unique tool for users to research heritage and complements genealogy tools such as FamilySearch, Ancestry.com, and other genealogy research tools. To start exploring and to sign up for a WorldCat.org account, visit the site at www.worldcat.org.

WorldCat.org Puts the World's Libraries at People's Fingertips

WorldCat.org, the only website that connects online searchers to the world's libraries, has been redesigned and reimagined to offer greater accessibility to the collections and resources of more than 10,000 libraries. From an updated technology infrastructure to a contemporary search interface and a wealth of additional user-centric features, the new site meets the needs of information seekers from academic researchers to those looking for their next vacation read. The new WorldCat.org makes it easier to discover unique resources from libraries around the corner or around the world. The improved site has a mobile-friendly and intuitive user experience informed by in-depth user research. And there are new ways for anyone to engage, explore, and share information and interests with others, including:

- The addition of resource pages for exploration of topics of interest
- Library information pages that feature locally relevant information
- Ability to select favorite libraries, create personalized lists of items in library collections, and share those lists in email or on social media
- Search results based on libraries and resources nearby

- Improved ways to find and get local library resources

Millions of people already explore billions of library resources every year through WorldCat.org. People are typically looking for information about historically significant and/or popular figures (like musicians, politicians, social activists, and athletes), time periods (like international conflicts, artistic movements, and revolutionary eras), topics (like genealogy or a personal hobby), or geographical locations. Searches include a broad range of languages, which reflects the diverse communities that libraries serve. Visitors search for everything from popular materials to unexpected finds across a wide variety of formats including:

- 440 million articles
- 405 million books
- 43 million e-books
- 25 million sound recordings
- 10 million music scores
- 6 million maps
- 30 million theses/dissertations

For people in school, starting a career, or considering a new hobby, WorldCat.org is an invaluable resource for lifelong learning anywhere on their journey. The site shows people all formats of library resources and highlights the materials that are closest to them.

JSTOR Open Community Collections now available through FirstSearch, WorldCat Discovery and WorldCat.org

JSTOR Open Community Collections are now available through FirstSearch, WorldCat Discovery, and WorldCat.org. This gives users of those services access to a breadth of freely accessible primary source content including artwork, photographs, publications, recordings, and other artifacts from hundreds of library collections around the world. Community Collections enables institutions to host their special collections on the JSTOR platform, making unique primary source collections discoverable to a large network of researchers, faculty, and library users worldwide. Universities don't have to be JSTOR participants to access or contribute to Community Collections. JSTOR Open Community Collections are included in the Open Access filter in WorldCat Discovery and WorldCat.org, and WorldCat Discovery subscribers can enable access to this content in the Metasearch Content area of OCLC Service Configuration. On FirstSearch, the collections are included in the Open Access Content database that library staff can enable in WorldCat Services administrative module. Users of these services will benefit from a trove of openly accessible special collections, introducing them to new avenues of research with seamless access to the information they need. JSTOR is part of ITHAKA, an organization dedicated to

improving access to knowledge and education for people around the world. Learn more about JSTOR at about.jstor.org.

WorldCat Discovery Installation on November 29, 2022

The November 29, 2022, special installation of WorldCat Discovery includes beta access to a new search alert feature for WorldCat Discovery Premium and WMS subscribers:

- Set up alert updates for a specific search query

Full details are available in the WorldCat Discovery Release Notes, Search Alerts Beta, November 2022.

Management Services

Choreo Insights, OCLC's New Library Analytics Solution to Better Align Collections with Priorities, is Now Available to Early Adopters

OCLC's new Choreo Insights™ library analytics solution is now available to early adopter libraries in North America seeking to better align academic library collections with institutional focus areas, emerging curriculum priorities, and future trends. Using WorldCat holdings data, Choreo Insights is a flexible solution that enables confident collection development decisions by comparing detailed subject breakdowns of local collections with overlap and gap analysis of any other library or group in WorldCat. OCLC has been working closely with several libraries to develop, test, and refine Choreo Insights. These libraries are using Choreo Insights for a variety of projects and programs, including:

- **Collection building.** Libraries can make cost-effective purchasing decisions by analyzing collection characteristics in a collective context of peer libraries.
- **DEI (diversity, equity, inclusion).** Libraries are better able to analyze and address collection diversity issues.
- **Academic program alignment.** Libraries can determine how well a collection supports emerging job market trends and key academic programs on campus.
- **Collaboration.** Libraries can identify cost savings opportunities through collaboration with other libraries, typically in a group or consortia context.

Choreo Insights analysis can take only seconds to perform and is not limited to one-time reports and static snapshots. Libraries can try a variety of analysis scenarios, such as comparing institutions with programs they hold in high esteem, or trim results based on years of publication and other facets. Libraries can map collections directly to academic programs using CIP

(Classification of Institutional Programs) mapping. They can also use Library of Congress classifications, FAST subject headings, simple title text searches, and more to see how collections stack up. Choreo Insights is now available to early adopter libraries in North America. OCLC will continue to work with libraries to further develop, test, and refine Choreo Insights. More about Choreo Insights is on the OCLC website.

Chaoyang University of Technology Now Live with OCLC's WMS

Chaoyang University of Technology, in Taiwan, is now live with OCLC's WorldShare Management Services as their new library services platform. Chaoyang University of Technology is a private, technical university located in the Wufeng District in Central Taiwan. Founded in 1994, the university comprises six colleges and 24 departments, offering 22 Master's programs and five Doctoral programs to their 14,500 students. Chaoyang has placed in the Times Higher Education (THE) World University Rankings for six consecutive years. Chaoyang University of Technology (CYUT) is the first university in Taiwan to adopt OCLC's WorldShare Management Services (WMS), an advanced, cloud-based library services platform, to enhance their workflows and allow them to better manage their library's collections. WorldShare Management Services (WMS) is a cloud-based library services platform with WorldCat as its foundation, which allows library staff to draw on OCLC's shared data network and technology 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.

Roanoke Valley Libraries to Improve Online Experience with Wise

Roanoke Valley Libraries (RVL) in Virginia, which includes libraries in Botetourt County, City of Roanoke, City of Salem, and County of Roanoke, has signed 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. Wise supports libraries' continued shift into dynamic centers of activity and expands the impact libraries have on their communities. Public libraries have become community centers with a broad range of resources and experiences for all ages. With Wise, RVL users can expect a personalized, easy-to-use online platform and personalized profile to help them discover what they want to read, find, and experience at the library. Wise allows people to identify things they're interested in, from new books to upcoming events, and be automatically notified when something is added that they might like. A traditional ILS keeps records of the libraries' collections and users. In contrast, a community engagement system like Wise makes it easier for users to discover and interact with the many experiences the libraries have to offer.

Wise is used by 75 percent of public libraries in the Netherlands, and has been adapted for use in U.S. public libraries. Roanoke Valley Libraries will also be using OCLC's CapiraMobile, a customizable app that allows users to engage with the library and learn about events, services, and resources conveniently through their mobile phones. The library can send notifications about new programs and promotions, allow users to search the catalog, and support self-checkout and digital library cards through CapiraMobile. Learn more about Wise at oc.lc/wise.

CONTENTdm Installation, August 17, 2022

The August 17, 2022 release of CONTENTdm has a small change with the account management portal for CONTENTdm. CONTENTdm uses **OCLC LDAP accounts** for all of its staff tools (CONTENTdm Administration, Website Configuration Tool, and Project Client), as well as Saved Items feature. The OCLC LDAP accounts are also used by old WorldCat.org users. When WorldCat.org rolled out its next generation interface on August 23, 2022, things changed as WorldCat.org users need to migrate to a different eIDM account system. That means worldcat.org links such as account/?page=register and account/?page=forgot are now redirected to new WorldCat.org's OCLC eIDM accounts management pages. To accommodate this change, we created a new account management portal for CONTENTdm (and DCG) users to be able to continue using their OCLC LDAP accounts. This new account management portal takes care of creating new accounts and forgot password for your OCLC LDAP accounts. You won't notice any change for CONTENTdm other than these functions related to account management. To read more about this change, see here. The key is that **CONTENTdm** and **old WorldCat.org** used to share the use of the **OCLC LDAP** accounts. Now **new WorldCat.org** has moved to a different account system. So, if you are trying to use CONTENTdm, use only the links on your CONTENTdm site's **login page** to manage your CONTENTdm accounts. (If you hide login page, add *digital/login* to your site's URL to get to the page. E.g., https://cdmdemo.contentdm.oclc.org/digital/login.)

EZproxy 7.2.8 Release Notes, August 2022

EZproxy version 7.2.8 is a maintenance release for EZproxy 7.2. This August 2, 2022, release resolves various issues introduced in version 7.2 and prior versions. New features and enhancements include:

- **Log enhancement.** An enhancement has been added to how EZproxy records the referring url in EZproxy. This is useful for tracking a user's journey through EZproxy.
- **OpenSSL.** OpenSSL v1.1.1q is included in the latest version of EZproxy. This latest version of Open SSL fixed AES OCB failure to encrypt some bytes on 32-bit x 86 platforms. For more information, please visit OpenSSL.

- **Pseudonymous identifier.** Taylor and Francis have been added to pseudonymous identifier functionality.

Bug fixes include:

- **Corrected behavior of the NeverProxy directive.** EZproxy 7.2 introduced an issue where the NeverProxy directive could affect the behavior of other EZproxy directive depending on the order in a config file. This led to the inability to proxy certain sites. The correct behavior of the NeverProxy directive has been restored.
- **EZproxy 7.2 did not comply with RFC 7231 section 4.3.2.** EZproxy is inappropriately waiting for a response body from HEAD requests. The result would lead to long load times on some sites. This issue has been corrected in this release.
- **EZproxy 7.2 introduced an issue with MaxSessions.** On Windows, MaxSessions was set to 15000, and on Linux, if set to 75000 or lower. The status page in the EZproxy admin interface would not load. This issue was resolved in 7.2.8.
- **EZproxy 7.2 introduced an issue affecting the security rules that allow databases to purge on a daily and weekly schedule.** Previously, if a rule took longer than a minute to process the performance of the EZproxy server could be compromised over time. To support cleanup from sites that this issue may have impacted, the security page now includes options to trigger an immediate security database purge and an immediate security database vacuum, allowing an administrative trigger these on demand.

Known issues include:

- **Caution when upgrading.** When upgrading from 7.1.X to 7.2.X a database upgrade takes place. If your security_v1.db file is located in your /security directory is large, the upgrade can take up to 15 minutes. During this upgrade, the EZproxy server is online but will be unresponsive to incoming connections.
- **Potential for rules to trip if a site uses Shibboleth authentication and usernames are not set in shibuser.txt.** If the EZproxy session variable login:loguser is not set in shibuser.txt, then the default username for all users using SAML authentication becomes "shibboleth." Since group rules are tripped at the username level, false rule trips may occur.
- **Rules with longer watch periods will consume more disk space.** Watch periods of 60 minutes or longer will consume more disk space in the /security directory to store the required evidence in the security database. You will need to monitor the disk usage in the /security database. Some of the default rules in EZproxy 7.1 contain monitoring periods longer than 60 minutes. If you have disk space constraints, consider commenting on those rules.

Full details can be found in the EZproxy 7.2.8 Release Notes, August 2022.

WorldShare Acquisitions Installation on October 27, 2022

The October 27, 2022, release of WorldShare Acquisitions provides eight new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- Transferring amounts between funds on a budget
- Viewing the budgeted amount history for a fund
- Using the Expected Fulfillment Date for an order item
- Using the Vendor Response field for an order item
- Using the Requires Attention field for an order item
- Importing EDIFACT order response data
- Improvements to the budget page
- Using a new matching algorithm for import of MARC order data

Full details can be found in the [WorldShare Acquisitions Release Notes, October 2022](#).

WorldShare Circulation Installation on December 4, 2022

The December 4, 2022, release of WorldShare Circulation provides new features and enhancements:

- View Loan Policy on checkouts table in Circulation
- Choose to include long overdue items in a user's list of current loans in My Account, SIP2, etc.
- Manage your library's override credentials in OCLC Service Configuration
- Manage your retention history settings in an improved interface
- Bug fixes and performance improvements

Full details can be found in the [WorldShare Circulation Release Notes, November 2022](#).

WorldShare License Manager Installation, October 22, 2022

The October 22, 2022, installation of WorldShare License Manager includes enhancements for improving your workflows. With this release you will be able to:

- Benefit from maintenance improvements

Full details can be found in the [WorldShare License Manager Release Notes, October 2022](#).

<u>WorldShare Reports Installation, September 29, 2022</u>

The September 29, 2022, installation of WorldShare Reports and Report Designer provides many new features and enhancements. These features will help you manage more complex workflows, including:

- Utilize new reporting for COUNTER 5 journal article usage (IR_A1)
- Analyze circulation hold approval and item preparation activity
- Analyze hold forwarding activity for your circulation group
- Utilize new measures in circulation standard reports and custom reports
- Support for taxes and service charges entered by the amount on acquisitions invoices

Full details are provided in the [WorldShare Reports Release Notes, September 2022](#).

Member Relations, Advocacy, Governance, and Training

<u>OCLC and Clarivate Settle Lawsuit</u>

OCLC is pleased to announce that on November 7, 2022, it successfully defended WorldCat to protect the collaborative service developed and maintained with and for libraries worldwide. An agreement has been reached in a lawsuit filed by OCLC in June 2022 against Clarivate and its subsidiaries in the United States District Court, Southern District of Ohio. Though the settlement document itself is confidential, two significant elements include:

- **Clarivate, Ex Libris, and ProQuest have ceased the development and marketing of the MetaDoor MARC record exchange system** developed using records that are subject to the WorldCat Rights and Responsibilities Policy.
- **Clarivate, Ex Libris, and ProQuest will promptly and permanently delete all MetaDoor work product** that incorporated or was based on records subject to the Policy.

Pursuant to the confidential agreement and elements noted above, OCLC has filed a dismissal of the lawsuit. Member libraries, publishers, data experts, and OCLC have worked collaboratively for decades to create WorldCat. Protecting this investment and infrastructure ensures innovation for all libraries and sustainability in the future.

<u>2022 Global Council Election Results Announced</u>

The 2022 elections for OCLC Global and Regional Council delegates are complete. Congratulations to the individuals who will begin three-year terms as delegates and officers starting 1 November 2022. The full list of Americas Regional Council; Asia Pacific Regional Council; and Europe, Middle East, and Africa Regional Council Delegates to Global Council can be

found on the [OCLC News](#) site. In addition to welcoming new delegates, new leadership for the Global Council and for each of the Regional Councils also began on 1 November 2022. The Global Council Executive Committee for 2022–2023 is:

- Global Council Chair and EMEARC Chair: Evi Tramantza, Director of Libraries and Archives, Anatolia College (Greece)
- Global Council Vice Chair and EMEARC Vice Chair/Chair-Elect: Matthijs van Otegem, University Librarian, Utrecht University (Netherlands)
- ARC Chair: Hong Yao, Director, Technical Services, Queens Public Library (New York, USA)
- ARC Vice Chair/Chair-Elect: Michael Levine-Clark, Dean of Libraries, University of Denver (Colorado, USA)
- APRC Chair: Muh-Chyun Tang, Associate University Librarian, National Taiwan University (Taiwan, R.O.C.)
- APRC Vice Chair/Chair-Elect: Gaye Rowley, Director of the Library; Professor in the Faculty of Law, Waseda University (Japan)

The OCLC Global Council plays an important part in OCLC's governance structure and is comprised of 48 member-elected delegates, each representing one of three regions: The Americas (ARC); Europe, Middle East, and Africa (EMEA); and Asia Pacific (APRC). Delegates work on behalf of the global membership to reflect the needs of member institutions, provide insights to help inform future strategic directions, and provide leadership for the election of six representatives to OCLC's Board of Trustees.

Pilar Martinez, Dwight Smith Take Seats on OCLC Board of Trustees

Pilar Martinez, Chief Executive Officer, Edmonton Public Library, and Dwight Smith, President and CEO, Sophisticated Systems Inc., took their seats on the OCLC Board of Trustees during the board's regular November 7, 2022, meeting. The two new board members serve in place of two retiring members. There are nine librarians from four countries serving on the 15-member OCLC Board of Trustees.

- **Pilar Martinez** is Chief Executive Officer of the award-winning Edmonton Public Library, where she is responsible for leading 650 staff and managing a $69M operating budget. Never settling for the status quo, Martinez is passionate about service excellence and is continually striving for improvement. She has championed numerous innovative services, including community-led and digital initiatives, such as 3-D printing. She has a broad base of experience in executive leadership including advocacy, strategic planning and change leadership. She holds an MLIS from the University of Alberta, a Bachelor of Arts with Honors in English from Acadia University and is a Certified Corporate Director (ICD.D). Martinez is highly engaged with the community, serving on several boards nationwide,

including the Urban Libraries Council Executive Board, the Public Lending Rights Commission, and as an Adjunct Professor for the University of Alberta's School of Library and Information Studies. She has served on the Working Group of the Centre for Free Expression for several years and is passionate about advocating for the fundamental value of intellectual freedom. Martinez has received several honors including the Queen Elizabeth II Platinum Jubilee Medal, the CLA/Ken Haycock Award for promoting librarianship, the Library Association of Alberta's President's Award in 2016 for her contributions to the library field, and the Distinguished Alumni Award by the Library and Information Studies Alumni Association in 2018. Martinez was elected to the board by OCLC Global Council earlier this year.

- **Dwight Smith** is President and CEO of Sophisticated Systems Inc. since 1990. Sophisticated Systems, based in Columbus, Ohio, provides businesses with a comprehensive set of information technology solutions ranging from technology deployments and assessments to fully outsourced managed services in areas including cloud computing and cyber security. The company's management services business supports companies in a wide range of industries. Smith is a recipient of the prestigious E&Y Entrepreneur of the Year Award. Smith currently serves as Board Chair of The Federal Reserve Bank of Cleveland and is a Board member of Nationwide Children's Hospital and the Highlights Foundation. His past board experience includes The Columbus Foundation, Columbus State Community College, Rev1 Ventures, State Auto Mutual Company, and several organizations focused on our youth. In 2015 Smith co-founded My Special Word, a non-profit focused on empowering children around the world and the importance and impact of positive words. He is an active investor and mentor for a number of entrepreneurial ventures. Smith is a committed philanthropist. He is very active in his community and believes that it is an honor to be able to contribute to enhancing the lives of others. He has served as an Adjunct Professor in the MBA Program at Franklin University and is a guest lecturer at The Fisher College of Business at The Ohio State University. Smith was awarded an Honorary Doctorate Degree from Franklin University in 2021. He graduated from The Ohio State University with a BS in Marketing and an MBA in Finance. Smith was appointed by the Board in September.

Retiring from the OCLC Board are Craig Anderson, University Librarian (retired) at Deakin University in Geelong and Melbourne, Australia, and Kathleen Keane, Director (retired), Johns Hopkins University Press. 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 libraries. They also elect members to the OCLC Board of Trustees.

Creating Community Connections Through Collections and Services

As the holidays approach and schedules become busier, we invite you to find a quiet moment to explore these resources that can offer inspiration and support for the work you're doing and highlight different ways to better connect your community members to your library's collections and services. Learn more about how WorldCat.org can help reach new library users, engage with veterans and their families in your community, and find inspiration in one library's fresh take on the Library of Things trend.

- [Connecting Libraries and People through the New WorldCat.org](#)

  Libraries have always been trusted spaces in our communities, and the events of the past several years have brought more attention to the important work they're doing. Yet there are still people who haven't connected with libraries, either online or in person. How can libraries engage with more people? WorldCat.org hopes to help answer this question through a redesigned website that offers new and enhanced tools for users and libraries. The new site introduces more interactive and personalized features that can help reach even more people.

- [Libraries and Veterans National Forum Toolkit](#)

  Veterans, military service members, and their families are among users of virtually every library across the country. Indeed, libraries play a significant role in supporting veterans and military-affiliated patrons by welcoming them to the community, providing resources during transitions, connecting them with other veterans, and even simply recognizing their service. Although many libraries already engage their veteran and military-affiliated patrons, others are just getting started. The IMLS-funded Libraries and Veterans Toolkit can help.

- [Spice of Life: Adding Variety to a Library of Things](#)

  Libraries of Things have been growing in popularity in recent years, offering community members the opportunity to borrow items beyond the books and media most people associate with libraries. Libraries across the country have expanded their offerings to include diverse items such as cultural passes to local museums, outdoor adventure kits, sewing machines, WiFi hotspots, tools, and even musical instruments and art. One small-town library in Maine has put a culinary spin on the Library of Things trend.

Check out our upcoming webinars for opportunities to connect and learn in real time. Topics include suicide prevention for veterans, social work approaches to library services, and strategies for creating inclusive spaces, and programming for patrons living with memory loss. Explore the

list of free webinars and an online conference for even more opportunities to learn and connect with others in the field.

<u>WebJunction to Support Three New IMLS Grants</u>

OCLC's WebJunction program will support efforts in three new <u>Institute of Museum and Library Services</u> (IMLS) grant projects. WebJunction will serve as advisory, dissemination, or design partners on one IMLS National Leadership Grant and two Laura Bush 21st Century Librarian Program grants. The WebJunction team will be working with partners on these IMLS grants, leveraging their experience and expertise in designing, delivering, and disseminating transformational programs that connect public library service to community needs. Read summaries of these responsive new projects below to learn more.

- <u>Libraries Count: Support Diverse Young Children and their Families in Math</u>

  East Tennessee State University will partner with the School of Library and Information Studies at the University of Alabama to create and evaluate an online professional learning program, Libraries Count, for library staff to integrate math into programming for young children and their families. Project activities will include codeveloping the program with key stakeholders from a culturally-responsive, strengths-based perspective in diverse settings; piloting, evaluating, and iteratively improving the program; rolling out and evaluating the impacts of the program at scale through WebJunction across the pilot and additional states; and publishing the final program on OCLC's WebJunction for libraries to access for free and disseminating the results through the Association of Rural and Small Libraries (ARSL), the Collaborative Summer Library Program, ConnectedLib, Young Mathematicians, and other collaborators. As a subrecipient, the University of Alabama will lead the portions of the project that involve connecting with libraries, resolving issues related to libraries and families in rural settings, and library training.

- <u>Building Equity-Based Summers Through Libraries and Communities</u>

  The California Library Association will collaborate with the National Summer Learning Association and OCLC's WebJunction to work with library staff across the country on the Building Equity-based Summers project to build equity into summer services. The project will bring opportunities for states to re-envision summer services and effectively engage youth and families from minority communities. Activities will include codesign and training, reflection on learning, review and iteration of materials, a community of practice, opportunities to connect with community stakeholders, and implementation of equity-based practices. The project will result in enhanced skills for library staff to work with youth and families from minority communities and state library administrative

agency staff in codesigning and bringing equity-based initiatives to library staff in their state, as well as the youth, families, and adults who, through targeted equity-based opportunities, will learn, grow, and thrive.

- Digital Playful Exploratory Resources to Combat Mis/disinformation

  The University of Washington Information School, in collaboration with the Seattle Public Library, San Diego Public Library, and rural libraries and Washington and Colorado, will codesign a set of innovative online play-based digital activities for children around combating misinformation in libraries. Activities will include researching and writing a white paper on children and misinformation; codesigning activities between librarians, teen leaders, and children; developing digital play-based activities; creating a scalable online codesign curriculum for librarians to create their own play-based misinformation activities; and building a hub for accessing all the project resources. Families and children, public librarians and educators, researchers, and designers will benefit from this project.

Stay tuned for updates on our work on these new grants by subscribing to Crossroads, WebJunction's email newsletter.

Core Skills for Lifelong Learning

Courses and webinar recordings are always free through the WebJunction Course Catalog, providing on-demand learning on topics relevant to library staff and volunteers. Create a free account and you'll have access to nearly 400 self-paced learning opportunities to help you and your team meet your community's ever-changing needs. The featured webinar recordings below highlight core communication skills that can help you better manage conflict, excel at customer service, and address implicit bias in the library workplace. With communication topics always in high demand, these selections were three of the most popular with WebJunction learners this past fiscal year.

- Ten Tips for Managing Conflict

  As libraries have opened their doors and people have begun to re-engage in the community, the transition to normalcy is taking time. This webinar highlights the ideas and practices that help us navigate the challenges we find in communicating with others. These tips include ideas about how we communicate what we are thinking and how we listen to what others have to say, and presenters illustrate each tip with real-world examples.

- Extreme Customer Service, Every Time

    Commitment to great customer service goes beyond "service with a smile." It is a commitment to truly engage and communicate with patrons and to find ways to extend the experience above and beyond their expectations. Presenter Gretchen Caserotti provides practical and actionable ideas that can help your library, whether small or large, commit to excellent customer service.

- Implicit Bias in the Library Workplace

    How do library administrators and managers foster a healthy, inclusive work environment so that all employees can succeed? Unfortunately, individuals with diverse backgrounds experience subtle and overt bias in the library workplace due to the divisive climate in which we live. We have each been a part of either end of the bias whether we know it or not. In this Infopeople webinar, presenter Dr. Michele A. L. Villagran shares examples of implicit bias within the library workplace and discusses best practices for addressing and minimizing implicit bias in recruitment, hiring, and retention.

To access all upcoming WebJunction events and webinar recordings, go to the Events Calendar.

OCLC Research

Museum of Fine Arts, Boston Library Joins the OCLC RLP

The William Morris Hunt Memorial Library at Museum of Fine Arts, Boston joins the OCLC Research Library Partnership (RLP) as a Partner. The Museum of Fine Arts, Boston Library comprises the William Morris Hunt Memorial Library, eight curatorial department libraries, and the Center for Netherlandish Art Library. As the intellectual hub in support of all research activities occurring in the institution, the library's primary mission is to meet the research needs of the museum staff by evaluating, selecting, acquiring, organizing, and providing access to its collection. While the library's primary audience is the museum staff, it also extends its service and access to the general public and scholarly community seeking art research resources. The combined library holdings total more than 400,000 items, including 60,000 auction catalogs and over 150,000 serials and ephemera. The library collection reflects the strength of the Museum's encyclopedic collections and supports research on the Museum's permanent collections, special

exhibitions, and general art history. The OCLC Research Library Partnership supports focused programming and research in four areas crucial to research libraries:

- Research support
- Unique and distinctive collections
- Resource sharing
- Next generation metadata

Across these four areas, the RLP seeks to support libraries through the challenges of COVID-19 and to advance equity, diversity, and inclusion efforts. The RLP currently comprises 125 Partner institutions around the world.   Visit oc.lc/rlp to learn more about the OCLC Research Library Partnership.

The NCAR Library Joins the OCLC Research Library Partnership

The NCAR Library delivers innovative information services in support of the advancement of Earth system science at the National Center for Atmospheric Research (NCAR). Located in Boulder, Colorado, NCAR is the Federally Funded Research and Development center for the atmospheric and related earth sciences sponsored by the National Science Foundation. The NCAR Library features a specialized collection of resources for scientists and other researchers, staff, and administrators on topics related to climatology, meteorology, space weather, and beyond. The Library's staff of 13 provide bibliometric, data management, reference, and liaison services; manage OpenSky, the organization's digital repository; and operate the NCAR Archives.

Vassar College Joins the OCLC Research Library Partnership

Vassar College Libraries has joined the OCLC Research Library Partnership (RLP) as a Partner. The libraries at Vassar serve as a central hub for the intellectual life of the campus. With over 1,000,000 volumes and vast online offerings, the libraries fuse rich collections with expert help, inspiring spaces, and facilities that support a wide range of activities, from quiet study to small group projects and collaborative work.

OCLC Partners with Dutch Library Consortia on Open Access Discovery Research

OCLC Research is partnering with two Dutch library consortia—Universiteitbibliotheken en Nationale Bibliotheek (UKB) and Samenwerkingsverband Hogeschoolbibliotheken (SHB)—to investigate ways that libraries at universities and universities of applied sciences can improve the discoverability of scholarly, peer-reviewed open access (OA) publications for their communities. Dutch academic libraries have been instrumental in the progress toward full open access to publications for all educational institutions and research domains in the Netherlands. The Open

Access Discovery project is investigating how staff at Dutch universities and universities of applied sciences are integrating scholarly, peer-reviewed OA publications into their users' discovery workflows, which will provide valuable evidence for other libraries wanting to make their own practices more effective. Visit OCLC Research to learn more about the Open Access Discovery Project and what it hopes to contribute to libraries and open access scholarship.

REALM Public Health Crisis Management Playbook for Archives, Libraries, and Museums

The *Public Health Crisis Management Playbook for Archives, Libraries, and Museums* offers a set of guiding processes, resources, and tools to aid cultural heritage institutions when planning for, navigating through, and recovering from a significant public health emergency. This publication will be useful for any archive, library, or museum staff who will take part in a crisis management planning or communications team. The playbook is part of the REopening Archives, Libraries, and Museums (REALM) project and is published by OCLC. This playbook is available for use online and as a downloadable PDF document, and includes four chapters and an appendix covering the following topics:

- **Crisis leadership**—Provides starting points for crisis management and communications planning
- **Facilities and operations**—Offers considerations for determining processes for decision-making about collections management, space configuration, building systems, and safety protocols
- **Crisis decision-making and risk management**—Overviews risk assessment, information gathering, and decision-making during uncertain times
- **Resource networks**—Shares strategies for identifying partners and maintaining collaborative relationships, including a tool for visualizing an institution's potential partners during a crisis
- **Resources for more information**—Provides all resources used to develop this document, as well as additional materials that can be used in developing a public health crisis management plan

In the REALM project, OCLC partnered with The Institute of Museum and Library Services and Battelle to produce resources and research to support operational decision-making during the COVID-19 pandemic for archives, libraries, and museums.

OLAC Cataloger's Judgment: Questions and Answers

Jay Weitz, Column Editor

Question: According to the RDA Registry, field 340 subfield $p, subfield $2 should be coded "rdaill". However, in BFAS there is no link to the RDA Registry and the examples do not have subfield $2 terms. What guidelines should we follow, BFAS or the RDA Registry? Also, most terms in the registry are now singular: illustration, map, graph, plan, etc., when they used to be plural. I'm just looking for some clarification.

Answer: The field 340 subfield $p text is taken directly from MARC 21 and the examples are adapted from the same source, which has plural terms in subfield $p. The Original RDA 7.15.1.3* (still in force currently) says in part "Record the term in the singular or plural, as applicable." The "RDA to MARC Bibliographic Mapping" (under "Tools" in the Original Toolkit) maps RDA 7.15 to the Books 008/18-21, field 300, and field 500. The mapping has not been updated for many years (and will not be updated), whereas field 340 subfield $p was defined in MARC in 2020. The (not yet implemented) Official RDA Toolkit element "illustrative content" does include element references to MARC Bibliographic field 340 subfields $p, $0, and $1; as well as to field 500, field 300 subfield $b, and Books 008/18-21. Similar to the Original RDA, in Official RDA there is the LC-PCC option for recording singular or plural terms (25.36.13.82)* and various options for both controlled terms and uncontrolled terms. In other words, as I read all of this, the current examples in both BFAS and MARC 21 are still correct. In BFAS, we have now added a link to the "RDA Illustrative Content" vocabulary, changed the subfields $p to singular, and added subfield `$2 rdaill` in each case. Thanks for calling that to our attention.

* Editor's Note: RDA Toolkit links marked (*) require subscription access.

Bound and Determined

Question: We are wondering about RDA standards regarding field 020. In our catalog we were using (paperback)/(hardback). In BFAS field 020 International Standard Book Number, there is a mixture of examples, and we have also seen (hardcover) too. In the below record (1081341733) the items has subfield $e rda in field 040, but has the abbreviated (pbk) in field 020. I have changed it to (paperback) but feel as if I shouldn't on a pcc record. We were wondering if the OCLC guidelines should be updated with the preferred examples for AARC2 and RDA clearly shown? Or is (pbk) acceptable in a full RDA record?

Answer: Unless I have long been overlooking or misunderstanding something, neither AACR2 1.8B, Original RDA 2.15, nor Official RDA (under "type of binding" for field 020 subfield $q)* requires that a controlled term be provided, although there are certainly options for supplying controlled terms under "Recording a structured description" (RDA 58.78.21.37). An option under "Recording an unstructured description" (02.25.69.96) is to "Record an uncontrolled term or a term that is transcribed from a *source of information*" (14.99.16.51); in other words, to transcribe the term as it appears. In the RDA Metadata Guidance Documentation, MG: Manifestation: Identifier for manifestation: Two or more identifiers, British Library practice is presented, in part, as follows: "Record any qualifiers on the manifestation as they are presented and any supplied qualifiers in full. For example transcribe 'pbk.' but supply 'paperback.'" If I am understanding all of this correctly, an RDA record could accurately and acceptably present the qualification of an ISBN as abbreviated or as spelled out, depending upon the situation.

* Editor's Note: RDA Toolkit links marked (*) require subscription access.

A Multifaceted Question

Question: May I ask about WorldCat indexing? I saw there is facet searching under 'Contents' label for fiction and non-fiction which is for generic identification. But I don't think there is specific faceting available for short stories, poetry, essay, etc. Am I right? I am talking about WorldCat indexing from BKS 008/33, Literary Form. Even though catalogers input 'j' for short stories, or 'p' for poetry, the system does not index that far. Can you confirm?

Answer: Material Type indexing based on BKS 008/33 is relatively limited and does not delve down below the basic level of "fiction" into the specifics of dramas, essays, short stories, and so on. You are correct. There are, however, other ways by which to approach that sort of detail. There are genre/form headings for things such as short stories (gf2014026542), poetry (gf2014026481), essays (gf2014026094), drama (gf2014026297), novels (gf2015026020), humor (gf2014026110), satirical literature (gf2014026525), personal correspondence (gf2014026141), speeches (gf2011026363) – in other words, most of the Literary Form types that may be coded in BKS 008/33. In fact, approaching bibliographic records via genre/form headings can be even more detailed and specific than any Literary Form code indexing could be. As an example, in addition to the general genre/form heading "poetry," there are 115 more specific categories of poetry, from "Alcaics" (gf2020026065) to "Yue fu" (gf2014026597) to choose from. Details of searching WorldCat by Genre/Form (word index "ge:" and phrase index "ge=
"), using both headings (655) and genre/form subdivisions (subfield $v), can be found in Searching WorldCat Indexes.

Persistently Objectionable Identifiers

Question: I am trying to create a new record for a Blu-Ray, but I cannot enter the 024 because I keep getting the following error message: "1st $a in 024 is too long." The MARC field guide seems to indicate that I just need to scan in the barcode, but whenever I try that it won't accept it; the only way around it seems to be omitting the 024 altogether, which is obviously not an ideal solution. Is there a way around this?

Answer: Many different types of standard identifiers can be housed in field 024. Some may explicitly say which type they are and others may not. Publishers may misuse the standard numbers or misprint them. Numbers accompanied by bar codes may or may not correspond to the identifier generated when the bar code is scanned. In other words, there are any number of things that can go wrong. First, make sure that you have accurately identified the kind of standard identifier you have and that you have correctly coded the First Indicator for that code. Universal Product Codes (UPC, First Indicator value "1"), International Article Numbers (EAN, First Indicator value "3"), and Global Trade Identification Numbers (GTIN-14, First Indicator value "7" with subfield $2 gtin-14) are the most common for video recordings, but there may be others. BFAS field 024 explains how to identify several common codes. The MARC Standard Identifier Source Codes list lists the codes that can be identified with First Indicator value "7" and subfield $2, but also links to documentation about many of these types of identifiers. For most identifiers, omit or remove any spaces, hyphens, or other punctuation within the identifier. (Serial Item and Contribution Identifiers or SICIs, First Indicator value "4", is a major exception to this.) If you have scanned the bar code and generated a number that WorldCat validation does not accept, the invalid code may be placed in subfield $z. If the scanned code and the eye-readable code differ, transcribe the number that appears as well and code the Second Indicator in both fields 024 with value "1" ("Difference").