

Meeting Minutes/Summary
February 2009 Members Council Meeting

Group Name: Cataloging & Metadata

Prepared and submitted by: John Chapman

Have the minutes been reviewed by the group chair? Yes No

Meeting minutes should be concise (not exceed two pages), summarize major discussion points, and be reviewed and approved by the group chair. **Recorders, please email your meeting minutes to Bunny Gunderson (gundersb@oclc.org) by the close of business on Wednesday, February 25.**

Attending:

OCLC staff present:

Glenn Patton, Cynthia Whitacre, Ted Fons, David Whitehair, Robert Bremer, Brenda Block, Susan Walker, Sandi Jones, Lisa Elliott, Karen Calhoun, Rich Van Orden, Doug Potts, Kay Covert

Present in person:

Lynn McKinney [(OCLC Western), Exec Committee],

Present online:

John Walber, Mary Ann Laun, Kendall Wiggin, Mary Konkel, Pamela Bailey, Micaela Chavez, Christopher Cole, Linda Bills, Pat French, Janet Lees (OCLC), Theresa Byrd, Elizabeth Cox, Claudia Frazer, Susanne Schriar, Ted Schwitzner, Patricia Kantner, Daniel Boivin, Randy Dykhuis

Meeting Minutes/Summary:

The majority of the meeting was devoted to an update by Glenn Patton on the Expert Community Experiment.

The Expert Community Experiment is designed to allow those with full cataloging authorizations to make more extensive changes to records. Despite OCLC historically having allowed member edits, recently there has been demand for more permission. The experiment is a reaction to this, as well as to feedback that the Enhanced program application process is too complex. Additionally, WorldCat local accelerates timetable for demanded changes – institutions rely on master records for their users and do not want to wait for changes.

Some types of records are not included in the experiment, most notably PCC (BIBCO and CONSER). However, all LC not coded PCC are included. Non-PCC CIP records can be changed, but encoding is set at 8. These restrictions are not set in stone; this is a test to see if these exclusions make sense and are at the right level.

Glenn stated some principles that he sees as norms for the experiment, and for cataloging in general: “Do

no harm,” and “If in doubt, don't!” He says that these are really an outgrowth of the common principle of shared resources: “Leave it better than you found it.”

The experiment begins Feb 15 and lasts roughly 6 months. No changes are required at the library end; there are some new reporting and recordkeeping codes for OCLC staff. Specifically, new replaces are counted under product code ONT6390 - appears on some reports including the detailed usage report. There will be no credits awarded right away, but lump sum will be settled later if required. This issue is tied in with overall reevaluation of cataloging credit system which is underway.

Users are asked to share issues and questions on OCLC-CAT but can use private email for questions as well (ASKQC@OCLC.org).

Conversations have begun with Enhance participants to see how Enhance can be expanded. Some ideas - doing maintenance on headings, merging records - will be explored throughout experiment.

Linda Bills commented that we should try to open up all changes to all people.

Glenn Patton characterized the Expert Community experiment as a reaction to that desire. However, he said, we have seen in the past that capabilities for changes have not been extensively used - not the level of activity you would expect based on overall subscription numbers. If we set it up, will they come? What is the payoff for changing workflows to edit more records? Will this save time or make more work for library staff? He talked about the trust members must have in the shared catalog. There is a need for trust – between individual libraries, and between OCLC and library staff. OCLC is also looking at ways to make more data come in via batchload process - headings, call numbers, etc. – which is another method by which local work is reflected in the master record.

Ted Schwitzner asked about the problems of local data, especially as it relates to WorldCat Local.

Glenn responded that OCLC is looking at ways to leverage Local Holding Records (LHRs) to incorporate more local data - also indexing differently. Pat French commented that many libraries do not use local holdings for anything very complicated, and Ted confirmed this, saying that LHRs not indexed the same. Glenn assured them that this was known and the investigation is evolving, and that OCLC has capabilities to generate LHRs from other holdings data - other possibilities exist. David Whitehair pointed out that the proposed implementation will likely stretch the boundaries of MARC in terms of holdings records - we will likely not refer to it as “MARC Holdings” later.

Pat French asked if the corrections have to be done as "part of the experiment?"

Glenn clarified that the new functionality is seamless – no separate environment or permissions. He also reminded everyone that the replace action is required to actually change the record. Client users may want to lock the record if the action takes a long time.

Recommended Agenda Items for Next Meeting:

Several attendees requested a progress report on the Expert Community Experiment.

It was also requested that OCLC prepare a strategy to respond to the desires expressed in the October survey of OCLC-CAT and Members Council for more training for catalogers on Next Generation concepts.