Meeting Minutes/Summary
May 2008 Members Council Meeting

Group Name: __Cataloging & Metadata Service Group_

Prepared and submitted by: __Cynthia M. Whitacre__
Have the minutes been reviewed by the group chair? Yes XXX   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 Tuesday, June 3.**

Attending:
Delegates: Kendall Wiggin (Chair/NELINET), Bruce Willms (Vice Chair/MINITEX), Susan Currie (Nylink), Berndt Dugall (OCLC EMEA), Patricia French (OCLC Western), Jan Ison (ILLINET), Mary Ann Laun (OCLC Western)

Guests/Observers: James Pakala (MLNC), Phyllis Post (AALL),

OCLC IFLA Fellows: Seleney Aytaç (2003 Fellow), Kamil Giri, Cyrill Walters

OCLC Staff: Karen Calhoun (OCLC Liaison), Cynthia Whitacre (OCLC Recorder), Glenn Patton (Presenter), Brenda Block, Mitzi Brown, Kay Covert, Bruce Crocco, Lisa Elliott, Linda Gabel, Janet Hawk, Thom Hickey, Sandi Jones, Janet Lees, Bob Van Volkenburg, David Whitehair

Meeting Minutes/Summary:

Following introductions, Karen Calhoun gave her presentation on survey results concerning the LC Working Group Report "On the Record". (Here is the working group report: http://www.loc.gov/bibliographic-future/news/lcwg-ontherecord-jan08-final.pdf)

Calhoun Members
Council May 20...

Members Council
Survey Results...

The survey, sent to MC prior to the meeting, asked respondents to name the best and worst recommendations in the survey, as well as roles of libraries and of OCLC in implementing recommendations. Karen received a variety of divergent results, indicating lack of consensus about the survey recommendations. (See PowerPoint and handout).

Karen addressed the issues of B&T records and reported on cataloging credits in her PowerPoint. She emphasized that the variety of records within WorldCat will only increase as the use of WorldCat continues to grow and change. The OCLC membership needs to build a community understanding of the multi-use resource that WorldCat has become. The group commented that cataloging credit structure needs an overhaul in the future. The cooperative cannot sustain incentives at the current level if everyone in the cooperative truly contributes their share for improving existing records. Glenn Patton explained that the initial intent of credits was to cover the cost of thorough searching before original contribution when pricing was unbundled into transaction charges from the FTU charge. They were not intended to cover the cost of creating an original record.

Discussion among the group also showed a variety of opinions, including:

- The report is objective and provides options and good recommendations
- It is important to work with 3rd party vendors to obtain a higher quality of bibliographic records
- The report is frightening to catalogers
- OCLC needs to allow more people to edit more fields in more records
- Duplicates are a serious problem in WorldCat
- A credit overhaul is needed
- Editing records to meet local needs is very important to research libraries/Are specific edits for specific libraries really needed?
- Deciding not to do local edits can be freeing for copy catalogers
- One size doesn't fit all in the cataloging world
- More filters for searching were suggested so catalogers get tighter result sets
- Training for catalogers is key

Delegates also discussed the importance of communication from OCLC to catalogers so that they are not surprised by new developments.

Karen also discussed a 3 month experiment planned for sometime in FY09 that has been proposed by WorldCat Quality Management. The wikipedia model will be applied to WorldCat to allow more editing of full level records by all full level cataloging members. This will be a volunteer activity, and essentially will give all catalogers the equivalent of Enhance status. If the experiment is successful, OCLC will adopt this model and refocus the current Enhance program to use more powerful tools to make corrections. WorldCat Local sites are particularly interested in this model.

Delegate reaction to this planned experiment was quite positive. More careful management of OCLC authorizations and passwords for cataloging was suggested, to assure that only truly authorized people were allowed to edit records. One person offered the idea of charging higher cataloging fees to members who never enhance any records and lower fees to those who do, instead of offering credits. Karen pointed out that this experiment will address the situation of those who are willing to edit online in WorldCat, but doesn't address the workflow for institutions who edit only in their local systems after downloading records. Another solution will be needed to help libraries in this situation to share their upgraded records for the benefit of OCLC libraries and WorldCat end-users.

Glenn Patton then informed the group about the quality survey currently underway by Janet Hawk and her staff. Discussion groups, focus groups, pop-up surveys on WorldCat.org and other tools are all being used to gather information on what various groups consider necessary for quality in WorldCat records. While we understand the quality requirements of catalogers fairly well, we need to understand as well the quality needs of end-users and of library staff that are not catalogers and other OCLC partners. OCLC will use the data collected to build a business case for future directions and priorities within the WorldCat Quality Management Division.

Glenn also specifically asked the delegates for reactions to the Encoding level 3 guidelines that were distributed prior to the meeting. These were developed by OCLC staff in consultation with the OCLC Cataloging & Technical Services Advisory Committee. The delegates gave an all around "bravo" to these guidelines which address the need for a "basic" record level stated in previous CMSG meetings.

Recommended Agenda Item for Next Meeting:

- Report on any action items resulting from the quality survey that is currently underway to assess what a "quality" record is from multiple viewpoints.