



SWAN Cataloging Advisory Notes

Thursday, January 09, 2020, 01:30 PM – 04:00 PM
SWAN Quail Ridge Conference Room

Members:

For Circ Adv and Cat Adv, list members (elected/appointed) - for all other groups list attendees at the end and remove this section

1. Joy Anhalt (Tinley Park Public Library)
2. Victoria Bitters (Eisenhower Public Library)
3. Mary Clapp (Sugar Grove Public Library)
4. Kerry Halter (Batavia Public Library)
5. Susana Leyva (Palos Hills Public Library)
6. Jim Lindt (Wood Dale Public Library)
7. Nora Mastny (Downers Grove Public Library)
8. Melissa Siddiqui (Oak Brook Public Library)
9. Julie Tegtmeier (St. Charles Public Library)
10. Amy Weiss (Woodridge Public Library)
11. Colleen White (Oak Park Public Library)

Facilitators:

- Scott Brandwein (SWAN)

Agenda/Notes:

- I. Welcome and introductions

This inaugural meeting of the Cataloging Advisory Group in its new format got off to a strong start. The topics of cataloging standards, expectations of OCLC Cataloging Libraries, and providing feedback on cataloging quality dominated the discussion. As such, the conversation did not cleanly follow the agenda since each topic informed discussion on the other topics. This was primarily a high-level discussion of what this group sought to achieve this year.

II. Group Goals and Membership Responsibility

Being a new group, we discussed a definition of the group's overall mission and what the membership hoped to accomplish in the coming year. We agreed that the general purpose of this group is to leverage the expertise of the cataloging staff of SWAN libraries to confront and solve problems related to the SWAN catalog including quality of cataloging and adapting our cataloging to meet the needs of the SWAN membership and patrons. We will raise and discuss issues brought to the table by SWAN staff and Cataloging Advisory members as well as those raised during Cataloging User or other membership meetings.

The group also expressed a willingness to assist SWAN with cleanup and quality control projects on a volunteer basis.

For 2020, the group's priorities are:

1) To reassess and clarify the roles and expectations of OCLC Cataloging Libraries with the intention of rewriting the agreement and application process and conferring with OCLC Cataloging Library staff that the framework is acceptable.

2) To establish a process of auditing and feedback to member libraries on catalog record quality.

3) Continue work on SWAN Cataloging Standards. Now that the initial push is complete, we intend to refine the expectations and simplify the documentation to make it more SWAN-specific and user-friendly.

III. Meeting Locations

Due to the size of the group, SWAN asked members about the possibility of hosting meetings at member libraries. We received some offers and will follow up privately. As of now, all meetings are planned to take place at SWAN's Quail Ridge office.

IV. Quality Control – Auditing and feedback

Before discussing this topic, we discussed the need to clarify the expectations of being a cataloger in the SWAN membership. It was agreed that cataloging at an OCLC Cataloging Library mean more than just bringing in full records and that a certain degree of editing and refinement can be expected but that this might not be fully understood at the moment.

This led to us setting the goal of clarifying these expectations and communicating with Cataloging Libraries to ensure full buy-in.

We then discussed the idea of quality control auditing and feedback. It was agreed that some framework needs to exist and that SWAN staff will take the reins in administering it, but what that will look like is still to be determined. For our next meeting in March, SWAN staff as tasked with developing a prototype system including methods for gathering and evaluating bibliographic records, tracking errors and missing data, and communicating these back to

member staff.

The group differed on the topic of consequences for repeated instances of low-quality cataloging. While it was generally understood that there may come a time when intervention is required, it was difficult to determine a threshold for action. Concern was also raised about the harshness of action taken. This is an ongoing discussion.

This portion of the meeting also touched on smaller issues such as the reporting and resolution of duplicate records, the challenges of running reports on MARC data to identify clean-up opportunities, an interest in getting SWAN cataloging staff involved in a discussion forum, and the possibility of a distribution list for cataloging topics and reminders. All of these topics will coalesce in what this group produces later this year with regard to quality control recommendations and auditing processes.

V. Cataloging Standards – Continued refinement?

Now that the Cataloging Standards have been available for a few months and members have started using them as training materials, we've gotten some feedback that they need further refinement. The density of the documentation was a major concern, so this group will be tasked with refining these documents. For the next meeting, SWAN will take an example portion of our Standards documentation and rewrite it per the conversation at this meeting. When originally constructing the standards, the task force cast a wide net. Generally, we wish to pare it down to just the guidelines unique to SWAN.

SWAN will also provide a prototype document for a cataloging "cheat sheet" that can be distributed to member staff summarizing highlights of the standards in an easily-digestible form.

Both of these drafts will be the focus of our next meeting, and once we come up with a model the group likes, SWAN can apply it to the remainder of our support site documentation.

VI. President's Day Weekend Index Rebuild

Since this meeting, the bibliographic index rebuild has been rescheduled to Monday, February 24th instead of President's Day.

SWAN presented the list of bibliographic changes we intend to make before the bibliographic index rebuild later this month. Members of the group suggested refinements to the list, adding and removing items for various reasons. The current draft of this list can be found in as the "Packet" for this meeting.

The primary changes are the implementation of new processing of Invalid Standard Numbers (ISBNs, ISSN, UPCs). Any numbers marked "invalid" with a subfield |z in the bibliographic record will no longer be used for matching by bibliographic load processes including Acquisitions reports. This will help incoming items and orders target the correct bibliographic record and

prevent them from attaching to, for example, records for book club bags or kits.

We will also be cleaning up a good deal of junk data including 9xx fields remaining from acquisitions processing and bibliographic migrations, subject headings that are not a part of the SWAN core cataloging standards, and other fields that are already filtered from our current bibliographic import settings but find their way into our catalog nonetheless.

We will also be cleaning up call number analytics, GMDs, URL fields, and Title Control Numbers.

The list of changes is ambitious, and time and the abilities of the Symphony API may prevent a couple of the cleanup points from being implemented. SWAN will send a final list of achievable changes prior to the rebuild.

VII. Next Meeting

Thursday, March 05, 2020, 01:30 PM – 04:00 PM (SWAN Quail Ridge Conference Room) - Register on L2 [<https://www.librarylearning.info/events/?eventID=30247>]

Attendees:

1. Joy Anhalt (Tinley Park Public Library)
2. Victoria Bitters (Eisenhower Public Library)
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4. Kerry Halter (Batavia Public Library)
5. Susana Leyva (Palos Hills Public Library)
6. Jim Lindt (Wood Dale Public Library)
7. Nora Mastny (Downers Grove Public Library)
8. Melissa Siddiqui (Oak Brook Public Library)
9. Julie Tegtmeier (St. Charles Public Library)
10. Amy Weiss (Woodridge Public Library)
11. Colleen White (Oak Park Public Library)
12. John Bradford (Villa Park Public Library)

SWAN staff in attendance:

1. Angela Puckett (SWAN)
2. Claudia Nickson (SWAN)
3. Diane Nickolaou (SWAN)
4. Samantha Dietel (SWAN)
5. Sue Stupar (SWAN)