BCCATS FALL 2013 MEETING
Thursday, Sept. 19, 2013
Vancouver Public Library

Present:

Gwenda Bryan (Camosun College) bryang@camosun.bc.ca

Samantha Bloomfield (LRS/SD36, Surrey) bloomfield_s@surreyschools.ca

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Charles Hogg (BC Legislative Library) charles.hogg@leg.bc.ca (via Teleconference line)

Kathy Peters (Douglas College) petersk@douglascollege.ca (via Teleconference line)

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Valerie Grace and Elizabeth (Vancouver Island Regional Library, Nanaimo) 250-758-4697/250-729-2320 (via Teleconference line)

Janette McConville (SFU) janettem@sfu.ca (Chair)

Karen Nelson (Capilano University) knelson@capilanou.ca (recording secretary)

John Park (recent graduate, UFV Library Technology program) john.park@student.ufv.ca (guest)

1. *Approval of the agenda* (*moved, KN/carried*)

2. *Amendments to the minutes of May 9th Spring meeting* (*none: moved, PS/carried*)

3. *Business arising from the minutes:* tabled RDA discussion (#3 in May 2013 minutes) *removed from agenda* as sufficiently dealt with during round table reports.

4. *Round table reports* (see Appendix after Adjournment, below)

5. *New business*:
   5.1 Continuing Education Report (reported by JM on behalf of MC):

-Update on BCCATS continuing education:
Discussion of ideas for future workshops throughout the year or for BCLA, which will be earlier than usual (March 31-April 2, 2014), due to CLA in Victoria in May, and SLA in Vancouver in June. (Former workshops included: MarcEdit, Perl, serials and electronic serials.)
Accepted for BCLA: workshops on BibFrame and Linked Data. Volunteers to spearhead arrangement, Laurie and Mary Ann, with proposals to be ready for an early December deadline for the conference.

Also suggested for BCLA 2014 or the coming year: more RDA talks, perhaps a panel exchanging progress notes, questions and discussion. Include vendors in the panel, as the gap between what salespeople promise and what ILS's actually deliver is large. Address how RDA operates with prevalent mobile devices such as tablets, which require a different type of display.
(Side discussion ensued on: RDA challenges in general, especially access and display issues.)

Other suggestions: database maintenance, authorities maintenance

- Code4lib BC: May recommends that we donate our remaining training funds of around $600.00 to Code4LIB (this money would revert to BCLA if not spent by December 2013).
Queries: Is BCLA contributing? How do they feel about the idea? They seem happy with it.
Are there other entities we donate to? No, this would be our first sponsorship.
Should we retain some funds for possible expenses relating to the proposed technical services award? There are no fees connected with the proposed award, see 5.2 below. (moved, ?/ *unanimously approved.)*

5.2 *Awards Committee Report:*
See PS's email. Discussion ensued re. exact wording and intent.
Who is eligible: library technicians and IT staff as well as librarians and units? : Changed to "an individual or unit working in technical services". (Can be a unit or an individual).
Must the recipient be a BCLA member? : Awards from BCLA must go to a BCLA member, maybe even a *personal* member, not an institutional member. JM will confirm.
What about logistics? Note changed deadline re. submissions: applications must be in a month before BCLA so as to be in time for presentation on March 15.

5.3 *Language of cataloguing:*
Does anyone catalogue items in other languages than English?

Surrey School District catalogues French items in French using VMJ and other tools such as Transit, including access points in French and primarily French subject headings. (They have a native French speaker on staff).
Cap acquires ebibs in other languages (National Film Board, Gibsons collection) and leaves them as they stand.
UVIC accepts English in general, but bulk loads are sometimes preprocessed to avoid problems.

5.4 Leg Lib MARC record service:
How many import records off the Leg Library site? : UBC, UNBC, SFU. UVIC supplies some records, and Nancy is retiring. An IT staffer will continue the transfers on request, but recipients are asked to be aware that this change is coming; contact UVIC if problems are noticed.

5.5 RDA authorities:
PS asked who is loading the RDA authorities and how is it going?
VPL uses Backstage but notices increasing numbers of load errors; the Backstage mechanicals are a problem. Quarterly updates are now monthly. Will they do global updates to bring headings in line? Not worked out yet.

Global update discussion ensued. SFU has done 60,000 headings at around 5000 at a time. UVIC has no authority service; they bring in authorities individually from OCLC. Cataloguers are doing a lot of authority work as opposed to formerly bibliographic work, a lot of which is automated. Are authorities processes being applied to the large downloads of material not owned? No; but it is recognized that these entities may at last change their own records.

5.6 RDA taskforce:
Mac Elrod has pointed out that the multiplicity of policy change possibilities with RDA is huge; should we come up with a BC standard; should we survey to find out what BC libraries are doing, or start with task force first and set a suggested standard? Some feel yet another standard or set of decisions to consult and consider is counterproductive. Samantha at Surrey School District will forward their existing document to the listserv as a starting point.
The majority favoured a survey of what is being done province-wide, a best-practice record as opposed to a standard. A survey would also be valuable to validate local practices and back up local decision-making .
Are people using RDAToolKit workflows? There are good Canadian ones.
Result of discussion: the survey is the more popular idea; would need to be very specific, though
Vounteers to carry survey/statement forward: Mac, Ryan (via email), Samuel, Samantha, Karen, and Penny will coordinate. Would be good to get more public libraries involved. Mary Ann can organize an online meeting space if required.

5.7 OCLC: Changes in philosophy/direction?

KN has been trying to make sense of the new directions apparent at OCLC; issues include getting past the sales-talk on the website and getting concrete information on what the changes and the myriad levels of service offered *really* mean to the cataloguing community. Discussion ensued. With WorldShare, OCLC appears to be moving in a new direction with an ILS, a platform including much more than co-operative cataloguing, and consequently is perceived as behaving more like a corporation than a co-operative. Sales talk is aggressive. Be aware of all the services which may in fact be available at the level already subscribed to (CatExpress has 9 levels of service (and price!); Connexion is full-service and is the only level which includes authorities.

6. *Other business:*

Call numbers in electronic bibs (SEM):

Does anyone put call numbers in e-bibs?

Surrey School District has a virtual shelf to capture items for collection development and for users.

Cap cannot use 09x but can perhaps consider 05x.

SFU uses 050 for their new book list.

Most use the proper numbers on owned materials only, not on leased collection, though Douglas College did at least two years ago.

This is the last meeting for Nancy Stuart of UVIC, who has been a pillar of support to the group for many years. Best of luck and many thanks to Nancy.

Janette will clean up the BCCATS website and remove the redundant separate roundtable link, as the latter are now posted with the minutes.

Thanks to Vancouver Public Library, represented by Samuel and May, for a lovely venue for this meeting!

7. *Next meeting*: date TBA; location, conference venue if possible, but there is a danger that those who cannot attend the conference may not be able to enter? Possibility: 605 Robson Street, at the BC Libraries Cooperative Office if not many more than thirty attendees.

8. *Adjournment (But see Appendix below for Round Table reports in alphabetical order by institution. Includes a report from GVPL, whose rep was unable to attend the meeting.)*

Appendix A : Round Table Reports

BC Hydro Library and Archives (Elizabeth Byrne)

Digitization of print and photographic materials is ongoing and storage and access solutions are being examined. The ILS will be receiving upgrades today. The Records and Information Department, which the library is part of, has just been re-organized into Generation from Technology and Security. Library staff continues to work on requests, rush cataloguing, and then cataloguing backlog as time permits.

Emerging Services, BC Libraries Cooperative (Maryann Kempthorne)

- BC Libraries Cooperative is offering two key emerging services that touch on Cataloguing.

- National Network of Equitable Library Services (NNELS) project and Open discovery projects for libraries.

- The National Network of Equitable Library Services project will offer an alternate format union catalogue with linked repository functions from our systems to network access to copyright exempt materials and open resources for the print disabled. The proof of concept has been an interesting undertaking in managing end of life media collections and automating the ingest of the MARC records for contributors to the system.

- Open Discovery project reflects development of a third way for discovery tools using open access repositories and linked data collections that include bibliographic databases, institutional repositories, open repositories and less and less often subscribed resources.

- The open discovery project is trying to advance the case of a FRBR catalogue system. Public libraries interested in contributing MARC and for higher ed libraries that would contribute MARC to the beta. If sites are wiling to participate there are Canadian developers actively working on semantic web applications that want to create use cases personnel like cataloguers often know best.

- Also SLAIS LIBR511 – I am teaching LIBR511 Fall offering building on May Chan's leadership to go all RDA since the summer session. It is going pretty well though I still depend on AACR rules to teach students about the 'traditions' of much of the catalogue content they will deal with in the foreseeable future. Enrolment appears to be settling down after a long drought in offering this course regularly.

Camosun College (Gwenda Bryan)
- We upgraded to Symphony 3.4.1.3 in late April and our ILS is now fully RDA-ready.
- We are accepting RDA records from our vendor (Coutts) but are not yet creating original RDA records.

- Librarians Gwenda Bryan and Margie Clarke worked with a colleague in the Computer Science department over the summer to design a usability study which they hope to conduct later this fall in conjunction with a library website redesign.
- Library Technician Chris Murphy has joined our Interurban campus, where hours have been extended to include Saturdays. The Writing Centre is now officially part of the Lansdowne Library and Learning Commons, along with a Copyright Advisor (CUPE position) and a returning Learning Skills faculty position.

Capilano University (Sidney Meyers, Trevor Smith, Karen Nelson)

- Recently held a LibQual Survey (Cap got general high marks for staff skills and attitude; serious concerns with physical plant: too small, too noisy, not enough seating, not enough study rooms); dissatisfaction with perceived resources : including huge gaps in knowledge of what Cap Library offers
- Results: Communications Librarian (TS) and his team are working on a library presence with FaceBook and Twitter. Withdrawals and transfer of former reference materials opened up more seating area; plans continue
- Weeding in all formats including periodicals continues
- Fall project, the duplication of VHS to DVD with faculty input will be ongoing
- Trial of shelf-ready materials set for this fall (on a strictly targeted collection, with Coutts)
- Renewal of contract with AutoGraphics for a final year; first time OCLC membership at some level being seriously considered
- Early summer 2013 migration from Millenium to Sierra went smoothly, with snags still to work out. (The latter is not in fact RDA-compliant by default.)
- RDA records being accepted, bulk of AACR2R records hybridized per BCCATS guidelines, no action on legacy or authorities yet
- Currently switching from SWETS to EBSCO
- Training new TS3 (shared position: formerly full-time TS, now TS4 cataloguer is full time)

Douglas College (Kathleen Peters)
- Library is moving to the Sierra ILS from Innovative Millenium in early December 2013

- After 42 years with Douglas College our serials Technician retired at the end of August and the position moved to Public Service so all the serials work moved to an existing print acquisitions Technician. Our TS department now has 6 staff including the supervisor, down from 7 staff.

- Douglas College Library posted a temporary TS Librarian position from Sep to Dec 2013, and Sylvia Nurse was hired.

- We are currently doing hybrid RDA original cataloguing and accepting full-RDA copy "as is" from various sources. We are importing RDA authority records manually as needed for new bib records and replacing AACR2 authority records (we are not keeping both).

Emily Carr University (Hillary Webb)
New at the Emily Carr Library:

- Interactive table:
  - We have installed an Epson projector that is connected to a Mac Mini, wireless keyboard and tablet, and projects the display onto a 3' x 4' table surface
  - The Mini Mac is also connected to an Epson document camera that scans 2-D and 3-D objects, as well as records video
  - The table also features a Leap Motion device (https://www.leapmotion.com/), allowing users to operate the computer interface with their hands, and an eBeam wireless, interactive stylus (http://www.e-beam.com/education/ebeam-edge/overview.html)

- Research Guides that we created in Wordpress (http://www.ecuad.ca/library/researchguides)

- iPad mobile learning lab
  - 10 new iPads that will be bookable by faculty to bring to their classes
  - These are in addition to the 20 iPads that we currently lend to library users

- Truth and reconciliation
  - Currently have an aboriginal reading room set up in the library in support of the Truth and Reconciliation events
  - Emily Carr held events on Friday September 20th including an exhibition of artwork, speakers (Sony Assu and Dempsey Bob), craft demonstrations, drumming and singing.

- Interlibrary Loan Service
  - We just signed up to use Titan File Share service (https://www.titanfile.com/)
  - Canadian-based and secure
  - Customized by the company with links that expire after 7 days, an email template and branding
  - User friendly interface and easy workflow
  - Langara has also signed up to use this service

- Games

- o   We started a board game collection with games like Bananagrams and Settlers of Catan
- o   3 day loan period
- o   Have been used for student games nights

- Library Social Media Committee was formed earlier this year
  - o   Library has had two photo contests with the goal of getting new promotional photos of the library
  - o   We now have and regularly update the following accounts: Instagram, Facebook,

Greater Victoria Public Library (Richard Violette)

- Staffing

  - o   Three retirements since May have resulted in a reshuffling of jobs and duties. Colleen Stewart, Collections Coordinator, retired at the end of June, and the duties of her position have been divided between the Technical Services Coordinator (now Collections and Technical Services Coordinator) and a new position, Senior Librarian – Collections, which is a temporary position with a term of 12 months while we evaluate the new structure. This position was filled by Lara Riecken, formerly Children's Collection Development Librarian. Her position, in turn, has been filled for the next year by Lonestar Stone. As a result of this activity, the department is now known officially as Collections and Technical Services (CaTS).
  - o   Our Cataloguing Assistant, Bev Harvey, also retired in June. Her position has been filled temporarily by Lori Percival, Senior Acquisitions Assistant.
  - o   TS Assistant Laureen Bacon retired in May. After a cascade of promotions and realignments, her position has been filled by Kim Redlin, formerly of West Vancouver Memorial PL.

- RDA Implementation

  - o   Implementation of RDA began on April 2. Staff is adjusting. No major issues so far, as we were well prepared. We continue to use both RDA and a decreasing number of AACR2 records (particularly in nonprint media).

- New Collection Initiatives

  - o   Staff Picks to Go: Mentioned in the previous report in May, these were launched on July 22.

o Local Musician CDs : Also mentioned in the previous report, this collection was launched on July 27 with a very successful free open air concert in Centennial Square to great success.

Legislative Library (Charles Hogg)

- Legislative Library has recently expanded its collection of digital documents to include publications from agencies with board members appointed by the BC government, select police departments and municipalities and other non-profit and research agencies. This is done in addition to our collection of BC Docs. These documents are not publically available but the cataloguing records are available. We may eventually include a checklist of this material similar to the one we produce for our BC documents.

- RDA and Legislative Library Records: The Library conducted a brief survey on the use of records and RDA. Many libraries are using the records and all libraries responded that there was no rush for us to adopt RDA for original cataloguing. This is good since we have not made quick progress implementing RDA. we will continue to work with our partners UVic and BCCats on making our records uniform when we move to RDA cataloguing.

SFU (Janette McConville, Penny Swanson)

Staffing
• Patty Gallilee (formerly Head of Acquisitions/Serials) is new AUL for Collections and Scholarly Communications (replacing Todd Mundle)
• SFU has hired a E-Resources Access & Systems Librarian for a one year term. Janis Banser will be assisting our two Unit Heads in Acquisitions/Serials with their workloads.
Catalogue
• We have started loading RDA authority records and are finding it is a lot of work to clean up and match up all our bib records.
• Serials/Acquisitions has now taken on the task of getting Marc records and verifying they are the correct ones for the items we have ordered for e-mono series and standing orders. The information is then forwarded to Cataloguing. This seems to be working well.
• SFU is no longer producing print theses – digital only.

Sitka, BC Libraries Cooperative (Laurie Davidson)

72 libraries (14 are multibranch) -- both Manitoba and BC, publics (85%), post-secs and government, sharing one ILS, using Evergreen software. Cataloging/TS de-centralized; no centralized technical processing, but a shared database.

Current Projects in Technical Services:

- RFI to Sitka libraries' major providers (primarily for public
- libraries) -- ULS, Whitehots, among others Looking for Sitka-wide agreements on:
  - Discounts on Materials Purchasing
  - MARC Record Provision
  - Processing Services (shelf-ready, spine labels, RFID etc)
  - ARP (Automatic Release Plans) and other Selection Services

- Identify vendors & services that could improve efficiencies, reduce costs, add value for members
  - Initiate pilot
  - Proof of concept
  - Development of policy and best practices

- Acquisitions Services:
- Acquisition module within Evergreen came out 2 years ago. Since then we have had been testing with 5 libraries within Sitka. There have been a number of feature enhancements and bug fixes; we are now ready to add more. Another 9 libraries joining in to use Acquisitions for
- Q1 of 2014.

- Authorities: We are currently not using authorities in Evergreen, however we are undertaking a project to load all authority records (from Backstage) and to link all of our bib records to the authority records.

- RDA: We have made our libraries aware that the Evergreen ILS works with RDA records for indexing and display, and have given our libraries the basics of how to recognize a RDA record, and that the
- system can support both RDA and AACR2 records. RDA records are coming
- in slowly -- ~3500 RDA records in system. Some individual libraries within Sitka will have their own policy on RDA best practices.

SLC (Mac Elrod)

- SLC has implemented RDA. The date was determined by ebrary's implementation of RDA; ebrary will accept only AACR2 records through September, and only RDA ones beginning in October. Several clients distribute records and PDFs through ebrary.

- SLC will not purchase RDA Toolkit licenses for SLC cataloguers.
- Instead cataloguers will use the MRIs:
- http://special-cataloguing.com/mris

- These AACR2 rule interpretations allow the creation of RDA compatible records using AACR2.

- Cataloguers will also use the SLC Cheat Sheets:
- http://special-cataloguing.com/cheats

- At the end of the Cheat Sheet contents page, links have been added to other RDA aids.

- SLC also has written procedures for each of its major clients.

- After giving the RDA text some time to settle down, SLC will purchase paper copies for Head Cataloguer Richard Violette and Quality Control Cataloguer Gary Parlee. We prefer a one time capital expenditure to annual license fees.

- SLC cataloguers with access to the Toolkit through other employment report that it is difficult to locate a needed rule, the language is not always clear, thre are too many options, and there are lacuna.
- Many Autocat and RDA-L posters report the same.

- SLC's major concern is that with the multiple options in RDA, there will be a loss of consistency in derived records. Some RDA options SLC will not adopt nor accept, e.g., unjustified added entries, "not identified" phrases as opposed to best guess, particularly imprint year; even AACR2 style [20--?] is more informative than "not identified". While only one author entry is RDA core, SLC will transcribe and trace at least three if present.

- When BCCATS began as an UTLAS users group, it set certain standards due to the shared database. These BCCATS standards included tracing all series (in advance of LC adopting that practice, and easier than merging authority files with local practices), and added title entries with numerals for titles with spelled out numbers. Should BCCATS consider creating a document which defines for members which RDA options are to be adopted? Perhaps Penny Swanson could be asked to prepare such a document for discussion, amendments, and adoption?

- The SLC Cheat Sheet RDA/AACR2 Changes gives several SLC choices of RDA
- options:
- http://special-cataloguing.com/cheats/rda_aacr2

Surrey School District (Samantha Bloomfield)

- We had a system upgrade in July
- Bought an ebooks product

- o Pilot project at 14 schools begins Sept23, 2013
- o Testing, documenting, implementing, etc. took much time over the summer
- o Still have issues to resolve over copy assignment within our centralized purchasing model
- Continued push for digital resources in classrooms
  - o We contribute to the conversations when we can
- Minor renos in our building:
  - o Vacuum lift purchased for the warehouse
  - o Student program being relocated to an unused area; some work required to ready the space
- RDA
  - o Preferring RDA copy when we find it
  - o Hope to begin original cataloguing in RDA at Christmas…depending on how the ebooks pilot progresses
- Support desk has been busy with account and reports problems relating to BCeSIS entry/Destiny update lag issues (this is normal for September)

UNBC (Deborah Hazell)

•   UNBC president George Iwama will not be extending his tenure to a second term. He will be leaving in June 2014.

•   Allan Wilson, our new University Librarian, started at the beginning of September. He has extensive experience and knowledge of the North, having been chief librarian at the Prince George Public Library for many years, and having worked in Prince Rupert. He has been a part-time history instructor at UNBC.

•   The Cataloguing in RDA workshops held in Prince George in July were a great success. A big thank you to the trainers.

•   ILS migration from Millennium to Sierra

•   Two special projects on the go in Cataloguing: topographical maps & a microfiche collection of archaeological field research in British Columbia

University of Victoria (Nancy Stuart)

RDA
- Our staff took RDA training in Nov. 2012. Continued in-house training and practice sessions weekly, then bi-weekly.
- Implemented RDA Mar. 31, 2013. If editing an AACR2 record, we create a hybrid. If doing an original record, we create an RDA record.

- Continued RDA sessions through Spring and early summer of 2013.

RDA authorities
- Two members took the RDA authority training refresher as we are part of the NACO Canadian funnel.
- Unfortunately we have very little time to practice creating RDA authority records for NACO, but some staff are creating new RDA authority records in-house.

Voyager
- We will be upgrading our Voyager system in Dec. 2013. Likely the last upgrade before we move to a new ILS.

LLBC records
- Even though UVic creates the LLBC provider neutral marc records for the BC ELN website, we were adding the monthly loads to our catalogue using an Add/Conditional bulk import rule, instead of a Replace profile. So we recently corrected this and cleaned up the duplicate serial records.

Retirement
- I will be retiring in October and am not being replaced. I fear this is a trend with Technical Services librarians.

Vancouver Public Library (Samuel Richmond, May Hmaidan)

- VPL is working to reform its iteration of Bibliocommons' mapping rules. Cataloguers Neil Oliver and Virginia Ho are leading the project in concert with the Systems Division.
  --Media mapping post-RDA = The New GMD
  --Goal is to make all formats including printed monographs map seamlessly via positive values

- The Division Head is holding "drop-in" informational sessions on RDA for staff outside Bibliographic Services, and has also completed the American Library Association's distance learning course "Planning and Preparing for RDA."
  --VPL has a phased implementation plan resembling SLC's, based on the timelines of OCLC/OverDrive and similar vendors
  --First (major) phase is on track for completion by June '14—print/core elements first, non-print + full FRBR engagement to follow
  --Drop-ins were first round of VPL's internal RDA Communication Plan—designed to be "jargon-agnostic"
  --ALA course primarily an email sounding board for in-progress planning docs—68 participants, mostly stateside libraries (Calgary Catholic School District, Edmonton Public

and Saskatchewan SILS Consortium were among the domestic libraries represented).

Collection updates
- Romance Paperbacks pilot project employs a brief entry to make this popular shelf-ready faster
- Our French-language collections are growing, and circulating across more branches
- Meanwhile VPL remains a monolingual cataloguing agency; status may be subject to review at an undetermined time, most likely after first phase of RDA implementation

Public services update
Cataloguer and BCCATS attendee <u>May Hmaidan</u> reported on two initiatives of the Information Services Review:
- o   Inspiration Lab, a section of the Central Library providing hardware and software tools for local artists, authors and composers. This is still in the planning stage;
- o   Mobile Reference, combining the roving reference model that is now a staple of many urban public libraries with current-generation mobile technologies, utilizing SMS and social media. Rollout is currently underway.

- Ebook Project update and report from VPL Staff attending Ebook sessions: Digital Directions conference at the Northeast Document Conservation Center and Digipalooza, the annual Overdrive eBook user group conference.

- Impact of Single Dewey Run on Bibliographic Services?—A virtual overhaul of VPL shelf arrangement and floor assignment:

- Virginia Ho has reported to staff on the proposed floor assignment of the SDR and possible impact of disbanding the 921 biography sections in branches and the former Popular Reading collection at Central. The final report can be found in the City of Vancouver's VANDOCS archive.

- Virginia has suggested conducting a survey with the branches to determine the usefulness of a separate collection code for all biographies, now classified by subject.