BCLA Cataloguing and Technical Services Interest Group (BCCATS)
Minutes
May 9, 2013, 1:00-4:00 PM, Kwantlen Polytechnic University, Richmond campus

Present:

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Approval of agenda:
The agenda was approved previously distributed, with one amendment as follows. Under point 2, 'Amendments from the Previous Meeting', the date should be September 14th Fall meeting, rather than the existing wording.

Approve minutes of the previous meeting:
Minutes were unanimously approved.

Business arising from the Minutes:
None

Round Table (reports below)

New Business:

1. Workflows for individually purchased e-monographs – who does what? (Penny Swanson)
The Legislative Library is just starting to work with electronic books. The librarians were doing the acquiring and cataloging for all of them, but will soon be getting the technicians to do the loading. At Kwantlen, the item is ordered from Coutts by Acquisitions; Coutts emails the MARC record with link to the Cataloging Librarian who load it; the Cataloging Librarian then emails Acquisitions to let them know it is okay to pay.
Additionally, what field is being used to keep rights information for these individual purchases? Kwantlen has been putting this into their ERM. SFU has been putting it into the bib record in 856 $z. UBC and Langara also use the ERM to track licensing with a link in the bib record that connects to the ERM and then to the agency that owns the rights. We will continue this discussion on the listserv.

2. *Continuing Education Report* (May Chan)
RDA: There will be two more RDA training workshops this spring, one in Kelowna and another in Prince George. The Kelowna workshop is almost full, the Prince George one needs a few more attendees to have it run. Based on the comments at this meeting and at other RDA workshops, should another RDA training session be held in the lower mainland? An email will be sent to the BCCATS list to see if there is enough interest for another workshop. If you attended an early training session, the newest slides can be found on the BCCATS pages of the BCLA website. Is any organization in BC interested in pursuing a consortial license for the RDA Toolkit?
Preconference workshop for 2014: the BCLA CE Committee is possibly looking for a preconference workshop for the 2014 BCLA conference. May will send out an email to see what ideas and interest might exist.
DataCamp: was held in March and seemed to be quite successful. Another will likely be held although when and where is not decided. The theme for the March event was mostly around introducing people to the open data movement. Digital literacy was one of the areas identified for a possible future theme. More information can be found at http://bc.libraries.coop/open/datacamp/
Code4Lib (Vancouver): a library technology community. Ontario has created a chapter of this. The Committee is talking about a fall meeting here.
For information: to find the links and documents that May is discussing, go to the BCLA website, click Interest Groups, click Cataloging…, click on 'Links' or 'Documents' [upper left of screen] as desired.
May will submit her questions and information to us via BCCATS.

3. *RDA discussion:*
Tabled at this time.

4. *Technical Services Award (Penny Swanson, Janette McConville)*
Is there a need to establish such a reward? Generally the group agreed there was. An ad hoc committee of Ryan (Langara), Penny (SFU), Charles (Leg. Lib.), May (BPL), Janette (SFU) will bring a draft criteria document to the fall meeting.

Other Business:
The Legislative Library provider neutral records – Nancy Stuart and Charles Hogg will look at them for their compliance with RDA and report back at a future meeting.

Notes regarding copyright in bib records: this may have changed since the copyright legislation. You may wish to check on your institution's policy/need.

Outlook online (BC Union catalogue): is it RDA compliant? Heather Morrison says she believes it is, but will take another look.

Next meeting:
Thursday, September 19, 2013 (1-4 PM).
Venue confirmed as
> **Vancouver Public Library**
> Morris Wosk Board Room, Level 7 (entrance directly ahead of up escalator)
> Central Branch
> 350 West Georgia Street
> Vancouver, BC V6B 6B1

   And of course, hearty thanks to Kwantlen Polytechnic University, Richmond campus, for hosting today's meeting, and to Linda Woodcock for organizing the room and refreshments.
   Meeting adjourned with reminder re provision of email or handwritten roundtable notes to the secretary.

Roundtable Reports

Burnaby Public Library (May Chan)
> BPL has seen a couple major retirements since the Fall 2012 meeting. Joyce Pinsker has retired as the Children's Coordinator. Her position has been filled by Vicki Donoghue, from Port Moody Public Library. Our Acquisitions Senior Clerk also retired and her position has been filled internally. The filling of these key positions has restored some stability to the Acquisitions department, and Cataloguing is seeing a spike in the backlog.
>
> All staff in the Cataloguing department has been fully trained in-house on RDA, using materials from the two-day BCCATS workshop. BPL staff outside the department that does some work related to cataloguing also attended the Surrey workshop. We have already started creating original records in RDA. While we expect to be in a hybrid environment for a while, we plan to be writing up some policies soon.
>
> BPL now has a modest cataloguing subscription to OCLC, which includes membership to OCLC. The subscription is to be applied strictly to world language materials in non-roman script, namely Chinese, Korean and Persian, since none of the staff are literate in these languages. However, as a member, we now have a medium to share our original cataloguing more broadly. A goal has been set to contribute originals by the end of this year.
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> As sessional faculty with UBC SLAIS:
>
> The cataloguing and classification course (LIBR511) is being offered in Summer Term 2 at SLAIS. The class is full. It will be the first time all course content is updated to reflect RDA. LIBR511 will have been offered 3 times in the 2012-2013 academic year. Demand remains strong for cataloguing courses at SLAIS.

Camosun College (Marion Davidson)

RDA: will be started gradually as Coutts begins to supply RDA records. We have upgraded to the highest (newest) version of SIRSI workflows. The Library was fortunate to not have budget cuts this year, one of the few departments at the college to be in this position. We will be trying to improve our online presence this summer by adding the SIRSI Bookmyne app to our website. The College Librarian, Sybil Harrison, was fortunate to be chosen as a judge for the 2013 Roderick Haig-Brown Regional book prize as part of the BC Book Prizes.

Capilano University (Trevor Smith; Sidney Myers)

The University has deleted some programs that have been standards since the establishment of Capilano. This constitutes a change in direction for the university. The library is doing some strategic planning. There has also been a massive weeding (mostly duplicates) going on. E-collections have become dominant. There are some staff vacancies due to retirements. They will be loading III Sierra for June 25. Looking at ways to share the RDA changes with their fellow employees.

ELN (Heather Morrison)

For those here who may not know, ELN acts as the co-ordinator for the Outlook online union catalogue; help make CUFTS available free; host the Legislative Library provider neutral records. There have been a number staff changes. Heather, herself, will be moving to Ottawa for a position at the University of Ottawa.

Kwantlen Polytechnic (Linda Woodcock)

There is a new university president. The university will have a new strategic plan in June. All departments, including the library, will create their own strategic plans after that. Chip Wilson (Lululemon) has made a major donation to implement a new school of fashion design at the Richmond campus. RDA will be a soft launch. By the end of June we will be on the newest version of SIRSI/Dynix. Already use the Bookmyne app for their students.

BC Hydro (Elizabeth Byrne)

- Library has been re-organized into Records and Information Management Department
- I attended the two-day RDA training in Victoria -- very valuable
- Took information back and presented to two other staff (Librarian and Libtech)
- Since January 2013
  o Library has been involved in a digitization project for archival documents and photographs relating to BC Hydro's assets
  o Contract Archivist created an inventory of archival photographs

SFU (Janette McConville, Penny Swanson)

Staffing
- There have been some shuffles/changes to staffing in Acquisitions and Serials. Frances Dodd (Systems & Technical Services Librarian) is now Unit head for Acquisitions. Sandra Wong (Electronic Resources Librarian) is Unit Head for Serials. Patty Gallilee (former Head of Acquisitions and Serials) is currently Acting AUL for Collections & Scholarly Communication.
- We recently filled two Cataloguing Assistant positions. Our Cataloging division is now fully staffed.
- Melanie Hardbattle was hired as Archivist for Special Collections and Rare Books (new position)
- Jenna Walsh was hired as Indigenous Initiatives Librarian (new position)
- Bennett Library has hired its first University Copyright Officer. Don Taylor (former Assistant Head of Access Services and IR Coordinator) will serve in this role for a one year appointment.

- The AUL for Collections and Scholarly Communication position (to replace Todd Mundle) remains vacant however the posting has closed and we expect the position to be filled soon.

Catalogue
- RDA training for Cataloguers is currently underway.
- Our reference collection has been weeded to less than 300 volumes.
- Reorganizations are occurring as we streamline our e-monograph workflows. Serials will be taking on the task of getting Marc records and verifying they are the correct ones for the items we ordered for mono-series and standing orders that come in electronic form. Once that is done the information will be forwarded to Cataloguing. There is a plan in place to also have Acquisitions do similar work for the e-monos they order.

- With changes occurring in some of the new positions being developed in the Library, staff are looking for ways to upgrade so they will have the skills needed when new job descriptions appear. The Library is currently looking for skills training workshops and welcome ideas/suggestions from other libraries.

Other
- Renovation to the main (3rd) Floor of the Bennett Library is planned for June to December 2013. The renovation will:
  o upgrade the entrance to improve climate control and the book return
  o integrate check-out, reference, and reserves into a single service location
  o increase seating with a new student lounge and a new reading area
  o create a programming room for Student Learning Commons teaching and other library events
  o expand the Student Learning Commons consultation area
  o improve exhibition space for new books and add Special Collections materials

Special Libraries Cataloguing (Mac Elrod)

Last year business improved with the acquisition of the University of Toronto Press and other large organizations as customers. SLC Directors met and selected options for the September 1st SLC implementation of RDA. See below. Some questions remain to be answered:

1) What relationship code, if any, should be used for conferences, e.g., the 111 in a record for conference proceedings? Somehow $4aut would seem to apply more to the writers of papers than to the conference. We are told $4aut can't be used in a 700 12 at entry for a conference papers.

We are considering omitting 111/711 codes. Usually it is clear from the conference name that it is a conference.

2) What relationship code if any should be used for jurisdictions, e.g., the 110 in a record for a law or treaty. We are considering omitting 110 jurisdiction codes, but not 110 corporate body codes.

3) What code, if any, should be used after uniform title main entries, e.g., 130 for Bible or title in the original language? We are considering having none.

BCCATS advice would be appreciated.

SLC Directors (Mac, Gary, Rich, Matt, with Norma absent) met March 18th to determine SLC RDA practices:

1. SLC will adopt RDA beginning September 1st, 2013. This date was influenced by ebrary accepting no RDA records before October, and no AACR2 records October or later.

2. In view of that, SLC will produce only AACR2 records before September 1st, and only RDA records thereafter, regardless of whether the derived record is AACR2 or RDA. No mixed batches will be sent to clients. Batches will be all AACR2, RDA, or RDA exported as AACR2 compatible. Aggregators may receive both RDA and AACR2 compatible if they wish. AACR2 compatible (with GMD and abbreviations) will still have RDA choice of main entry, LDR/18 i, with 040$erda and 33X removed. If editing from an SLC record, retain the 001 RSN (so that it will overwrite), and code LDR/05 c.

3. Most of the changes to create AACR from RDA, or RDA from AACR2, will be machine generated. Cataloguers will need to be observant concerning resources with more than three authors. The main entry, Cutter and title 1st indicator will require manual change. The RDA 100 may become the first AACR2 700. The AACR2 1st 700 may become RDA 100. Additional authors in 245/$c need not be removed for RDA to AACR2. Additional authors in 245/$c and 700s should be added for AACR2 to RDA. Transcribe only the first 10 authors, adding [et # al.] for the remainder.

4. Try to avoid inclusions by guessing place, publisher, and date; if required, use ISBD Latin abbreviation inclusions, due to the several languages of the catalogue among SLC clients.

5. End all descriptive variable fields with final punctuation (e.g., period, hyphen, closing parenthesis), including 246 and 300, whether 300 followed by 490 or not; do not follow "cm" with a period if folloed by another subfield such as $e. Never do double punctuate, e.g., "Second ed.."

6. Add $4 relationship codes to entries.

Surrey School District (Samantha Bloomfield)

Ebooks:
   Did a survey of ebook products and nothing fit all our criteria ; moving ahead slowly

RDA:
   seeing more RDA-only copy than we expected given our purchasing patterns ; timelines revised ; all cataloguers have gone to the BCCATS training ; orienting non-tech staff re changes they'll see in copy during their workflows

ILS upgrade
   Hope to upgrade our system in July to support RDA and ebook projects

Copyright
   New copyright legislation a big topic for us
   Trying to create documentation that is clear and accurate for our teacher librarians

Getting New equip in warehouse to assist with heavy lifting

School support
   2 new schools (and libraries) opening, plus a few others in flux...extra cataloguing and support ; School-based collection inventories common at this time of year…we loan them equipment and offer technical support

Learning commons
   14 schools taking part in pilot
   Each implementation is at discretion of Teacher librarians...we have no direct role EXCEPT there are extra questions about our technologies and online resources

Communications
   New email/web site implementation last summer has not met all our needs for communicating with the teacher librarians en masse…trying to develop a reliable way to do this

Selkirk College (Sian Landis)

Just trained in RDA. The library is starting to get some PDA e-books.

Vancouver Public Library (Samuel Richmond)
Staff changes: Valerie Voth now Assistant Manager, Central Selections Team ; Nancy Batchelar retiring August 2012 ; Karen Dawson, new full-time Cataloguing Assistant, January 2013.

Departmental reorganization: Technical services review ; Collections [development] merged with T.S. ; Multilingual collections included in the Collections/T.S. merger (heightened profile for Korean, French materials) ; Creation of new Bibliographic Services Division (2013) will bring expanded opportunities for cataloguing librarians ; Cataloguing Support [team] adds new brief entry categories (Zines, Romance)

2012 Stats: 5704 brief entry, 49,152 fully catalogued titles.

RDA: Terraced phase-in ; Initial round of implementations to be completed with adoption of SIRSI/Dynix BLUEcloud suite as successor to Bibliocommons.

Collection milestones: Ebook aggregate license holdings exceed 26,000 ; French language materials (all formats) fully floating.

University of Victoria (Nancy Stuart)
- New University Librarian, Jonathan Bengston, for UVic - have been going through strategic planning and soon to put it into an operational plan. A big focus will be on Digitization and Digital initiatives.
- A number of CUPE retirements in Technical Services and not all positions have been filled.
- I have been involved in the RDA Training workshops that BCCATS has been hosting throughout the province and we have just completed our 4th and will be doing another 2, one in Kelowna in June and one in Prince George in July.
- Getting our marc records for e-books and e-serials from Serials Solutions
- Have implemented a number of approval plans and are getting all our firm orders and approval plan books shelf ready.
- Our cataloguers are doing more special projects (reclassification of K to LC K) and metadata for Content DM items.
- Cataloguers are doing more original cataloguing for special formats like maps and scores and more gifts and Special Collections items.
- Implemented RDA Mar. 31, 2013 and have been have weekly and bi-weekly cataloguing training sessions.
- Will be rolling out a new Libraries website in Sept. 2013.

Thompson-Nicola Regional District Library System (Melissa Lowenberg)
TNRDLS staff will be attending the June RDA workshop in Kelowna. So we've been accepting records from our vendors but not yet creating in-house RDA records. We've been working on a large graphic novels project - recalling all of them from our branches, filling any series gaps, adding significant amount of new purchases, adding a collection prefix & circulation modifier which will allow us more precise access to the circ. data, as well as shortening the loan period.

Greater Victoria Public Library (Richard Violette)
1. Staffing
One TS Assistant position has been filled on a permanent basis; another is retiring at the end of May and will

be filled temporarily.

A reorganization has resulted in a new position, Digital Collections Coordinator, which has been filled by a former Branch Head, Anne Parker, who will share space with Collections & TS.

Our Collections Coordinator, Colleen Stewart, who has been with GVPL since 1982, is retiring at the end of June. Her position will most likely be filled on a temporary basis, pending an operational review.

2. RDA Implementation
The cataloguing librarians (Audrey Driscoll and Richard Violette) attended the RDA workshop in Victoria in November, and found it extremely helpful. Original records are now being created according to RDA guidelines; RDA copy is accepted when found; AACR2 records are updated by AACR2 standards, in accordance with "take what you see, accept what you find". We are therefore using both RDA and AACR2 for the time being. Nonprint records are "hybrids" as we are still using GMDs. Our authority records are fairly basic; we are not adding the new fields to them, but are changing headings as encountered (e.g., replacing dates with "d. + date" with "dash + date").

Our public catalogues still don't display 264 fields, but that seems to be an Systems/III issue. The 3XX fields do display by default, but there has been no feedback one way or the other. Eventually, we may wish to use them to create icons or something like GMDs, suppressing the actual 3XXs.

3. New Collection Initiatives
Weeding: Thus far this year, weeding has been done for audiobooks and CD kits (February), Music CDs and kits (March), DVDs and Blu-rays (April), and currently Non-Fiction Print.

Climate Action to Go Kits: Launched in October, 10 kits were initially donated by the Capital Regional District (CRD). Each kit consisted of a guidebook, books for adults and children, a DVD, and various pieces of equipment (thermal leak detector, LED light bulb, etc.). They were so popular that the CRD donated five more. They are loaned for the standard three weeks, and are floating.

Staff Picks to Go: To be launched in June, each cloth bag contains five adult books and one audiobook, centering around themes such as, "Fun for Foodies", "Historical Fiction", "Inspiring Stories of Survival", and "Madcap Travel Adventures". Kits will also include a booklist for those who want to read more in the same vein. Loan period will be 6 weeks, and the kits will float among all of our branches. The intention is to meet the needs of those who want a reader's advisory type experience, but want the speed and convenience of a pre-packaged selection.

Local Musician CDs : Also to be launched in June. This will be a collection of music CDs featuring local artists (i.e. Vancouver Island and the Gulf Islands) who have not yet achieved international status (i.e. Nellie Furtado and David Foster will remain in the general collection). It will be a mix of genres, and will be denoted with a call number prefix of "LOCAL" and an appropriate subject heading. The initial collection will be small (around 300-400 items) spread between our 3 largest branches. Local musicians have expressed a lot of excitement and enthusiasm about this collection (including donating some of their older titles), and we're looking forward to highlighting this local content. We plan to do an outdoor concert featuring local musicians to formally launch the collection.

Emily Carr University of Art and Design (Hillary Webb)
- I am the new Systems and Technical Services Librarian at Emily Carr. I started this position in November 2012. This is my first BCCAT meeting.
- As the new Tech. Services Librarian I am catching up on the stacks of original cataloguing (mostly artists' books and exhibition catalogues) as well as finishing the import of all electronic master's theses from 2009-present. These are now all available through our digital repository (CONTENTdm)

- All our eBooks are now in our catalogue

Upcoming projects:
- A plan for implementing RDA
- Planning for a new library space as Emily Carr will be moving from Granville Island to Great Northern Way to a new campus in 2016
- Our exhibition catalogues: currently they are shelved by acquisition number, which makes them difficult to browse. We are thinking of assigning LOC call numbers and putting them in the regular stacks, or organizing them by artist/gallery name
- Digitization of archival photographs. As we are in a time of transition these may be something of interest to the public to look at

In other news:
- The Show at Emily Carr (the graduate exhibition) is on from 10am - 6pm until May 19th

Langara College (Ryan Vernon)

General Library Updates-

Strategic Visioning: Started September 2012. Contracted Dysart & Jones Associates to lead the process which included all library employee meetings, faculty and student focus groups, and individual interviews with key stakeholders. We were lucky to have senior administration on the Steering Committee. They provided context at a broader level and actively participated in the all-library events. We concluded that process with a Strategic Plan for the Library for 2013-2020 (full document should be available on our website by the end of June).

Strategic Planning: We recently held our annual planning meeting and we defined concrete projects that relate directly to the strategic plan.

Learning Commons: This summer we are undertaking phase two of our Learning Commons development. This phase includes updating signage, renovating our Teaching Lab and Learning Technology Lab.

Copyright: We are currently operating under the interim AccessCopyright tariff; however, we will be leaving AccessCopyright behind before the interim tariff expires. We submitted a Business Plan in December and are well on our way with finalizing policies and procedures, developing a website, and augmenting our educational component. We have created a working group model and are trying to absorb as much as we can from Niina Mitter, our Copyright Librarian who is retiring the end of June.

Technical Services Updates-

Encore/EDS: Langara is beta testing Innovative's discovery layer product Encore/EDS

Weeding: VHS weeding continues. Last year we were able to incorporate study/seating into our reserves area, we hope further weeding expand capacity.

Documentation: Using the Confluence system, we have started migrating existing procedures into a unified system, updating those procedures, and filling in gaps as necessary.

PDA: We are beginning our second PDA (Patron Driven Acquisitions) pilot project, this time using YBP. Currently we are working with the vendor to define profiles, and plan on having pda sourced material available in our catalog before the September semester.

RDA: Last month we began adding RDA records to our catalog. We adopted a strategy of *minimal intervention* wherein we leave a record in the code in which we find it (we do not downgrade a full level RDA record to AACR2, or vice versa). Also, we *enhance records for access*. We do not retroactively describe items; rather, AACR2 records are edited to enhance access. Moreover, at the catalogers' discretion, pre-RDA records may be left as is if they already fulfill user requirements and accurately describe the resource.

Legislative Library of BC (Charles Hogg)

RDA Preparation- We have completed several staff training and info sessions, made changes to accommodate incoming records and are upgrading Horizon. We have not adjusted our original cataloguing practices but a working group has been formed to work towards implementing RDA. We don't anticipate cataloguing fully in RDA until next year.

MARC batch records: We are still producing the batch records and are pleased with the program. We are interested in knowing who is using our records and gathering any feedback. We will send out a survey on the BCCATS list and consult with the working group ahead of change to RDA.

Digitization Projects and Cataloguing: We are still actively entering records from our card catalogue into the system. Current practice is to create a quick record from the card for later review. When something is digitized we create a full record for it. We will be making records of available for digitization projects.

Other Topics: We are testing EZ Proxy for prime client remote access, lending ebooks readers and purchasing ebook titles and starting to assess material received from Library and Archives Canada. We have recently reviewed and updated our BC documents collection policy.

SITKA (Laurie Davidson)

For those who may not know, SITKA is a consortium of BC libraries. Currently we are exploring how all the libraries could share cataloguing. SITKA has not required all member libraries must switch to RDA. Both AACR2 and RDA will be supported.

University of British Columbia (Sue Andrews)

There is a new head of Technical Services who has a lot of preservation experience. UBC will soon be posting a position for a conservateur. Two branches have been closed due to budget cuts (both are hospital libraries). The doctors will get their materials virtually. The Music library is being moved into the I. Barber library. The top task right now is moving things -- one branch to another or alternately into electronic storage. The cataloguers are all trained in RDA. Expect that by summer all original cataloguing will be in RDA.

Quest University, Squamish (Shauna Bryce)

- we just graduated our 3rd class and we're about to start our seventh year of operation when we'll be anticipating well over 500 students
- this summer I'll be working on coming to grips with our e-resources
- two of us will be heading to Kelowna for the RDA workshop in June

Douglas College (Gretchen Goertz)

Working on RDA. The gmd suppression is causing some problems in their ILS. Particular attention is being paid to the icons that appear in the OPAC because they have become so important in the public catalogue now. Will be upgrading to SIERRA (III's staff client). Have begun a 'Zine' collection. Douglas will be hosting an international conference on comics in June called "Comics in the Multimodal World".
http://www.thedclab.org/conference/portfolio/

North Vancouver District Public Library (Nancy Hildebrand)

Last year NVDPL hired a digital services librarian. There have been many retirements so projects in some cases have needed to be placed on hold until positions are filled. Technical Services has changed its name to Digital Services and Resources.