The arrival of the holiday season seems to take me by surprise more and more every year. I catch myself frequently thinking, “Surely it cannot be that time of year already,” as I am sure many of you also do. However, in addition to the proliferation of holiday advertising, seasonal music, and other such reminders of the present place on the calendar, the arrival of the holiday season also brings on the realization that MOUG’s annual conference is just around the corner, and that I will find myself amongst many of you -- my beloved colleagues and friends -- in the Mile High City! We have a whopper of a program in store for everyone, and if you turn the pages, you will see conference information provided by our talented Continuing Education Coordinator, Michelle Hahn. Many thanks to Michelle and the Program Committee for their dedicated work on crafting our 2015 conference program!

Speaking of conferences, what an incredible meeting we had in Kansas City! The joint OLAC-MOUG conference from late October lived up to all of the hype, and then some. First and foremost, I would like to send out a huge thank you to the conference’s Local Arrangements and Program Committee Chair, Wendy Sistrunk. Wendy cheerfully and decisively led the planning leading up to the meeting, and gently but firmly made sure everything went along smoothly during the conference. Thank you, Wendy and your local arrangements and program planning folks, for your critical role in making OLAC-MOUG the meaningful and engaging experience that it was! The workshop leaders, as usual, imparted a wealth of cataloging knowledge to attendees, and the opening and closing keynote speakers challenged us to employ a spirit of optimism concerning forthcoming developments in our profession.

Thanks also to the OLAC Board for their friendly partnership in making this joint conference experience such a success! Our respective Boards enjoyed dinner together in Kansas City and brainstormed ideas for further collaborations between our two organizations. Stay tuned for more news on that in the near future.

One final note about the joint meeting in Kansas City, The MOUG Board had its “Summer Board Meeting Part 2” (Part 1 being our August Conference Call) there on Thursday evening. We devoted a large part of our time discussing the Web Implementation Task Force’s recommendation for a

(Continued on page 3)
The mission of the Music OCLC Users Group (MOUG) is to identify and provide an official means of communication and assistance for those users of the products and services of the Online Computer Library Center, Inc. (OCLC) concerned with music materials in any area of library service, in pursuit of quality music coverage in these products and services.

Thanks to all who contributed to this issue. The Newsletter is a publication of the Music OCLC Users Group. It is published three times a year: June, September, and December. Editor: Mary Huismann, University of Minnesota Libraries, 160 Wilson Library, 309 19th Ave. S., Minneapolis, MN 55455.

Communications concerning the contents of the Newsletter and materials for publication should be addressed to the Editor. Articles should be submitted electronically in Word. Articles should be consistent in length and style with other items published in the Newsletter. Permission is granted to copy and disseminate information contained herein, provided the source is acknowledged. Correspondence on subscription or membership (including change of address) should be forwarded to Nara Newcomer, MOUG Treasurer, Head of Music/Media Library, University of Missouri-Kansas City, G3C Miller Nichols Library, 800 E. 51st St., Kansas City, MO 64110-2499. (Dues in North America are $30.00 for personal members, $40.00 for institutional subscriptions; outside North America, $45.00 for personal members, $50.00 for institutional subscriptions; back issues for the previous two years are available from the Treasurer for $5.00 per copy.) A copy of the quarterly financial report is available from the Treasurer on request. Please note that subscriptions, once placed during the annual renewal period, may not be canceled, and no refunds will be given.

The Music OCLC Users Group is a 501(c)(3) non-stock, nonprofit association organized for these purposes: (1) to establish and maintain the representation of a large and specific group of individuals and institutions having a professional interest in, and whose needs encompass, all OCLC products, systems, and services and their impact on music libraries, music materials, and music users; (2) to encourage and facilitate the exchange of information between OCLC and members of MOUG; between OCLC and the profession of music librarianship in general between members of the Group and appropriate representatives of the Library of Congress; and between members of the Group and similar users’ organizations; (3) to promote and maintain the highest standards of system usage and to provide for continuing user education that the membership may achieve those standards; and (4) to provide a vehicle for communication among and with the members of the Group. MOUG’s FEIN is 31-0951917.

MOUG-L: MOUG-L is an electronic discussion list for the dissemination of information and the discussion of issues and topics of interest to music library professionals and users of OCLC products and services. To subscribe to MOUG-L, send an e-mail to listserv@lsv.uky.edu with the subject line blank. In the body of the message type: SUBSCRIBE MOUG-L <your name>

MOUG Website: http://www.musicoclcusers.org

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E-mail: Bruce_Evans@Baylor.edu

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Phone: 612-625-5616
E-mail: huism002@umn.edu

Continuing Education Coordinator
Michelle Hahn
Music Catalog Librarian
Southern Methodist University
Phone: 214 768-4526
E-mail: mhahn@smu.edu

OCLC Liaison
Jay Weitz
Senior Consulting Database Specialist
OCLC Online Computer Library Center
Phone: 614-764-6156
E-mail: jay_weitz@oclc.org
It's MOUG membership renewal time! The MOUG year runs Jan. 1-Dec. 31, so renew now for 2015! MOUG membership connects you to the OCLC music community, including this newsletter thrice yearly, dynamic meeting programming, and new initiatives to bring you even more for your money. I'll highlight just two of this year’s added values. First, a new website featuring improved access to MOUG information and resources for music cataloging is coming soon. Second, the 2015 MOUG meeting is extended to include a morning LCMPT/LCGFT meeting at no extra charge. See full details elsewhere in this newsletter.

All this, and no dues increase! Personal memberships remain $30 within North America and $40 outside North America. Institutional memberships remain $40 within North America and $50 outside North America.

MOUG processes renewal payments with PayPal’s secure online system. You do not need a PayPal account to use this feature, though you will be able to log in to your Pay-

To renew, visit: http://www.musicoclcusers.org/mougmembershipindex.html.

From the Chair
(Continued from page 1)

website-hosting service for our upcoming redesigned website. We had the good fortune to discuss the group’s recommendation with their chair, Autumn Faulkner. As I write this, the group is moving forward with purchasing Membee. (Please look for Autumn’s overview of the Task Force’s work thus far in subsequent pages of this Newsletter.) I would like to thank the members of the Task Force for the excellent work they have done to this point, and that I, along with everyone else, look forward to the unveiling of our redesigned website!

After discussing the Financial Planning Working Group’s (FPWG) recommendations at the Board’s August Conference Call, the Board put together an official response to those recommendations. In Kansas City we discussed how to put that all into action. While developments on that will emerge over the coming months, in the meantime we wish to include both the FPWG’s recommendations, and the Board’s responses to them, in this issue for everyone’s perusal. I hope everyone will agree that the FPWG really put an incredible amount of thought and care into these recommendations! Their passion and love for MOUG shows.

Since this Newsletter comprises the final issue before our conference in Denver, I would like to officially thank our two departing Board members, Casey Mullin and Marty Jenkins, for their service. Casey will have completed the first-ever four year rotation as Treasurer-Elect, Treasurer, and Past-Treasurer, and Marty will be completing his four years as Past-Chair/Chair/Vice-Chair. Both of them are hugely-talented, creative, and thoughtful individuals, and I will miss serving with them on the Board. Thanks to both of you for your exemplary service!

In closing I would like to express how much I have enjoyed my first as MOUG’s Chair. It would be hard to over-state how our tremendously talented Board has made my work so much easier and enjoyable over the past year. This positive experience confirms just how deep our organization’s talent pool is, which is why I am so honored and humbled by this privilege to serve you all!
Who’s excited for MOUG 2015? I’m excited for MOUG 2015, and I hope you are, too! We are still ironing out some of the minute details, but here are some of the topics you will find in our program:

- Utilizing student employees (MLS and non-MLS) in original cataloging workflow
- Good practices for processing institutional recordings
- Upcoming RDA updates
- Collaborating on discovery layers
- Cataloging beyond music materials
- Sharing unique resources for authority work
- And of course, the LCMPT/LCGFT training!

Please consider sharing your ideas for lightning talks. If you have something you would like to present, or something you think someone else should present, let us know! We want to bring you the programming YOU need, but WE need your help realizing what that is!

We look forward to seeing you in Denver for some great opportunities for learning, networking, and fellowship!

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**Web Implementation Task Force Report**

The MOUG Web Implementation Task Force was charged with redesigning the MOUG website, based on the recommendations of the MOUG Web Visioning Task Force. The charge includes choosing a new Content Management System (CMS), migrating existing content, and creating new content and more interactive functions.

During the past 6 months, the task force has identified desired features and functionality for a new website, reviewed a large pool of CMS and AMS (Association Management System) candidates, and evaluated the top three candidates in depth via free trials. We ultimately chose Membee, an AMS layer designed to work with the WordPress CMS.

The task force is now occupied with purchasing and implementing this product, and will soon focus on migrating existing information and creating new content. We expect to roll out the new MOUG website in the next few months, and hope MOUG members will enjoy the new membership functions, cataloging resources, and collaborative spaces the site will provide.

—Autumn Faulkner, Chair
Web Implementation Task Force
Music OCLC Users Group Annual Meeting

Tuesday-Wednesday, February 24-25, 2015
Westin Denver Downtown, Denver, Colorado

Preliminary Program

Tuesday, February 24, 2015
8:30-8:45 AM  MOUG Welcome
8:45-10:45 AM  LCMPT/LCGFT Workshop
10:45-11:00 AM  Coffee Break
11:00 AM-1:00 PM  LCMPT/LCGFT Workshop
1:00-2:00 PM  Lunch
2:00-3:00 PM  Plenary Session
3:00-3:30  Cookies and Lemonade

Wednesday, February 25, 2015
9:00-10:00 AM  MOUG Lightning Talks/Authorities Show & Tell
10:00-11:00 AM  MOUG Hot Topics
11:00-11:15 AM  Coffee Break
11:15 AM-12:30 PM  MOUG Business Meeting
12:30-1:30 PM  Lunch
1:30-2:30 PM  MOUG Enhance and Expert Community Working Session
2:30-3:30 PM  MOUG NACO-Music Project

We look forward to seeing you in Denver for some great opportunities for learning, networking, and fellowship!
**Music OCLC Users Group Annual Meeting**

**Tuesday-Wednesday, February 24-25, 2015**

**Westin Denver Downtown, Denver, Colorado**

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**REGISTRATION & HOTEL**

**Registration**


Early registration rates:

- First-time attendees -- $45
- MOUG members -- $90
- Non-members -- $115
- Students -- $40
- Members, single day -- $65
- Non-members, single day -- $90

*Please note, on-site registrations and online registrations made after January 23, 2015 will be subjected to an additional $50 fee.*

Online registration is provided by A-R Editions through the Music Library Association website, and does require login information. For those who are not members of MLA but would like to register for MOUG, please contact the MLA Business Office at [mla@areditions.com](mailto:mla@areditions.com) or 608-836-5825.

**Hotel:**

Westin Denver Downtown

1672 Lawrence St.

Denver, CO 80202

(303) 572-9100

Room rate: $149 per night + tax (currently 14.85%)

Reservations can be made online here: [https://www.starwoodmeeting.com/StarGroupsWeb/booking/reservation?id=1408158604&key=3A348434](https://www.starwoodmeeting.com/StarGroupsWeb/booking/reservation?id=1408158604&key=3A348434)
Introduction:

At the February, 2014 Board meeting in Atlanta, the Board charged the formation of the Financial Planning Working Group (henceforth WG), which grew out of realization that MOUG needs to be more intentional about use of its money. So we decided to set up this non-standing group to provide the Board with input on use of present money and soliciting future money. After further discussion to chart out the WG’s specific objectives, the Board came up with the following charge, distributed to the WG on March 21, 2014:

“This working group is charged to examine MOUG’s current financial situation and future prospects, and to recommend to the Board policies and initiatives in the following areas:

1. The Papakhian Travel Grant: consider ways to make funding for this award sustainable; and also make recommendations regarding the number and level of awards to be made each year.

2. General assets: recommend an appropriate level of funds to hold in reserve; consider strategies for investing reserve funds for maximum benefit to the organization; recommend ways to increase donations in light of 501(c)3 status.

3. New initiatives: recommend new or updated programs for which MOUG may want to spend some of its current savings, including but not limited to implementation of recommendations of the MOUG Web Visioning Task Force.”

Shown below are the WG’s official recommendations, structured around the three broad areas identified in their change.

Recommendations to the MOUG Board:

Ralph Papakhian Travel Grant:

1. The amount of each award should be increased from $100 to $150-$200, the increase to take effect in time for the 2015 MOUG meeting in Denver, Colorado.

   • Conference expenses incurred by award recipients have risen substantially, even assuming (as the WG does) that the recipient will have at least one roommate and that registration fees, accommodations, per diem costs, and miscellaneous expenses for both the MOUG and Music Library Association (MLA) meetings in 2015 do not increase much between 2014 and 2015.

   • The WG believes that it is better to increase the amount of each grant now, even if in so doing, at least for the next few years, MOUG will not be able to award quite as many as it has sometimes in the recent past. MOUG’s current operating balance as of February 2014 supports the proposed increase, assuming that the MOUG Board will limit the number of awards made in keeping with what it determines is readily available in current savings.¹

   • The WG is aware that a recipient could potentially also receive a Kevin Freeman travel grant from MLA for the same meeting week and location. We considered it unwise to limit the number of recipients of the Papakhian to only one per year while at the same time raising the dollar amount of that one award to such a level that a recipient of both the Papakhian and the Freeman could end up being given more than it would cost her or him to attend both meetings.

   • While we were not asked to consider the issue explicitly, the WG does not believe that a practice of awarding more than one grant in a given year in any way dilutes the award’s significance. (The question has been raised in casual conversation among the membership in the recent past.) The Papakhian’s stated purposes imply inclusiveness, and seem clearly to support the goal of helping as many interested, qualified applicants to attend the annual meeting as possible.

¹ We are speaking here about what we believe the Board should do over the medium term, until such time as the Papakhian grants are sufficiently endowed to be self-supporting, though the latter process will be very similar, requiring some caps on the number of awards (see 5, following).
Board response: “The Board recommends raising the amount to $200. To enable this change, the Board also recommends awarding up to a maximum of three recipients. We would announce both of these changes when the awards are announced over MOUG-L and other appropriate channels.”

2. The first objective of the proposed “First $100K” fundraising campaign (see details under New Initiatives, 1, below) should be to raise sufficient capital to invest in instruments that will provide adequate annual income to fund at least two Papakhian grants at the current recommended level of $150-$200 each (whether two, one, or no awards are made in a given year or not). Of course it should be understood that the amount of each award should be reviewed by the Board periodically for adequacy in relation to meeting expenses incurred by attendees, and will need to be increased over time. See also 3, immediately following.

3. The WG recommends that the first $50,000 raised in the “First $100K” campaign should be used to establish the A. Ralph Papakhian Travel Grant Fund (henceforth referred to as the Papakhian Fund), and that it remain a named MOUG investment to which members may choose to direct some or all of their 501(c)(3)-eligible donations.

- The WG hopes that sufficient fund-raising energies will be directed to this effort that the $50,000 designated as the foundation of the Papakhian Fund may be raised within three years, preferably in time to announce its achievement by the time of the 2017 MOUG meeting.

4. The WG recommends that suitably conservative investment instruments be found such that an annual yield of at least 1.0% may be realized once the Papakhian Fund has secured $50,000 in capital. This would generate $500 per year, which at the current recommended level of funding for each award would allow for at least two awards to be made from the Papakhian Fund in any given year, with some money left over (to allow for increased costs to attendees that could allow the Board to adjust the amount of the award upward even assuming no further rises in interest rates/yields on conservative investments over the next three-to-five years, something that seems unlikely). See also 5, immediately following.\(^2\)

5. The WG recommends that once the Fund is producing sufficient yields to do so, a maximum of two awards per year be made initially, from those yields, until such time as the fund’s capital and concomitant yields may allow for more awards to be made.

- It should be noted that once the Papakhian Grant is generating the expected yields, the Board could potentially choose to make more than two awards in a given year by turning for those additional awards to current, liquid savings, should MOUG’s overall balance sheet warrant it. The WG’s only caveat is that no investment capital, no funds from moneys set aside for operating contingencies, nor any yields from long-term investments outside the Papakhian Fund should ever be used for such purpose.

- Of course MOUG may have other, concurrent expenses and programs it wishes to pursue (see for example New Initiatives, 2-4, below) and those funding needs must also be considered when proposing to fund additional travel grants beyond those provided for specifically by the Papakhian Fund at any time.

Board response: To facilitate accomplishing the objectives of sections 2-3, we recommend switching to a bank with a 1% return on investment.

(Next Steps): Treasurer Nara Newcomer has agreed to head up this effort.

6. The Board should give consideration to awarding Papakhian grants to attendees at future joint MOUG/OLAC meetings, keeping in mind that OLAC provides what they call a “scholarship” that is open to any member of OLAC who has never previously attended a biennial OLAC meeting (see http://www.olacinc.org/drupal/?q=node/58#scholarship). The WG is agnostic about whether or not such an award should be contingent upon MOUG membership, or whether MOUG should make such opportunities available to both MOUG and OLAC members, regardless of whether there is any hoped-for commitment to MOUG in particular beyond the short term.

Board response: The Board recommends filing away this recommendation for future consideration when the next joint meeting comes along (that is, after the one this October). When that time arrives, the two organizations could, for example, get together and plan a joint grant or scholarship for that meeting, or whatever seemed most advantageous to both MOUG and OLAC.

\(^2\) The Board should note that this recommendation need no longer apply once MOUG has raised at least $100,000 in total capital, including the portion dedicated to the Papakhian Fund. This is specifically addressed in number 5 in the recommendations pertaining to the second part of our charge, General Assets, below.
and OLAC. Whatever our respective organizations decide, it would be useful to have that added to the OLAC/MOUG Meeting Handbook.

General Assets:

Board response: We accept the recommendations shown below as they are with the following comments (noted after each recommendation).

1. The WG recommends that MOUG set aside three years of operating expenses (that is, two years’ expenses beyond the current fiscal year’s), based on the two most recent years’ operating expenses plus 1.5% per year, with this additional percentage—a hedge against inflation—to be reviewed for adequacy every three years by the Treasurer and the Board. By “set aside” the WG means that such funds are not to be used for investment purposes; they are to pay annual operating expenses only.

2. The WG recommends that 1, preceding, be a Board policy only and not made part of the Bylaws, to allow for flexibility and adequate reaction time in response to rapidly changing market conditions or in MOUG’s particular financial circumstances. There is an ongoing need for the Board to be “fleet of foot” here, and the WG believes that there are currently sufficient safeguards in place to make it unnecessary to enshrine this matter in the Bylaws.

3. Consider extending the terms of some certificates of deposit (CDs) beyond the term of the current Treasurer. Newcomer did some investigating and discovered that it is now quite normal for the signatories to CDs held by organizations like MOUG to be mutable, i.e., that they may be changed mid-term without incurring fees or penalties, which means that those portions of MOUG’s investments that are not being held in reserve for contingencies (i.e., that are available for investment) could be invested in CDs with terms of three years or more should the Board deem that advisable.

Board response: (Next steps): Treasurer Nara Newcomer will investigate how to bring this recommendation to fruition.

4. Charge the MOUG Treasurer to investigate the comparative merits of online banks for MOUG vs. the large, national, brick-&-mortar institutions with which MOUG has traditionally done business. Post-9/11, the difficulties of transferring bank accounts among MOUG officers, whenever Board members (in particular, Chairs and Treasurers) have rotated on and off, have become extremely difficult to manage, in some cases even requiring travel by outgoing or incoming Treasurers that incurred costs for MOUG.

- The investigation should also cover conventional brick-&-mortar institutions that have developed a significant WWW presence and that may well be competitive now with online-only banks.

- This recommendation covers “banking” as it relates to all aspects of MOUG’s finances, both for operating expenses and investments, at least up until such point as the Board is ready to investigate possibly investing some portion of MOUG’s assets in equities and bond markets (i.e., after the “First $100K” has been raised; see 5, immediately following).

5. The WG recommends that $100,000 in raised capital be the first point at which MOUG considers a) engaging professional investment advice, and b) based on the Board’s conclusions regarding the advice received, consider investing some portion of MOUG’s assets in the equities and bond markets.

- It should be noted that this will add to the work of the Treasurer, since (for example) it might be desirable at first to invest no more than 40% of each

3 This reserve should be invested in relatively liquid instruments such as money-market savings accounts with low or no transaction charges and penalties, or in short-term certificates of deposit.

4 The Board should keep in mind that interest rates even on five-to-ten-year CDs right now are at historical lows, and that the risk of missing out on a rise in rates over the short term could outweigh the benefits of investing in longer-term CDs, though today’s situation is anomalous, at least from a historical perspective.

5 (To say nothing of time-consuming notarizing of numerous documents, witnessing of signatures, and so forth.) It may be that the services of some online banks (which have even been recommended by Consumer Reports) could alleviate some of these difficulties. Certainly having the Treasurer travel to effect a change of bank accounts—something that happened at least as recently as 2009—is an expense that MOUG should strive to avoid.

6 It was noted by at least one WG member that some local or regional brick-&-mortar banks offer services and fees that may be comparable to those of online banks, so those should be thoroughly investigated as well. (We don’t know if those smaller banks have all the same strictures regarding transferring of accounts & signatories, etc., that have been causing problems for MOUG with the larger national banks.)
of MOUG’s various investment funds of equities and/or bonds. But it would still be necessary to keep track of the total amount of money representing each named fund spread across all investment instruments, to report back to the membership exactly where their hard-earned dollars are going.

- To continue the immediately preceding bulleted example: $20,000+ of the first $50,000 of the Papakhian Fund might be invested in mutual funds X and Y (with Y being a “socially responsible” fund, something that both Ralph Papakhian and many current MOUG members and other potential donors would demand), each generating, say, 5 to 9% yields in decent market years (and more in great ones), but the remaining $30,000+ is held in an FDIC-insured, money market saving account earning—assuming that the Federal Reserve Bank eventually raises rates—1.4% annually after fees.

- The Board should be prepared to allow members to direct their donations solely into the socially responsible investment option, just as MLA currently does. Any investment professionals consulted for assistance once the first $100,000 has been achieved should be prepared to accept that as a requirement of the organization.

Board response: We definitely agree with $100,000 remaining as the benchmark for this goal. We also recognize that there exists the possibility that interest rates could go up. Therefore the actual dollar amount we would need to attain in order to comfortably pursue this action could be lower.

6. The WG recommends the following means by which to increase donations in light of MOUG’s recently acquired 501(c)(3) tax status:

- See 1, under New Initiatives, following.

- As part of the strategy to implement New Initiatives, 1, suggest to members that they make donations in honor of MOUG Distinguished Service Award recipients whom they particularly admire, or any other MOUG- or OCLC-affiliated person who has served as a mentor or career inspiration.

- The WG does not wish to go into great detail about tactics or strategies for retaining or courting donors, as it is beyond the scope of our charge. However, mentioning a few basics here may be appropriate: a) Acknowledge all donations publicly (offering members a choice to have their donations acknowledged or not, or to be listed as anonymous), in the Newsletter and possibly on the website, at least annually. b) The Treasurer should acknowledge donors via letter, and the Chair should thank all donors as a group at the annual business meeting; c) Ribbons or stickers might be made available to donors in their meeting registration packets, to place (if they so choose) on their name tags indicating the fact of a donation over the previous fiscal year; d) Donors could be reminded annually via letter of their giving patterns (listing the years in which they gave, and how much), a best-practice that is followed by the development offices at many colleges and universities. And so on.

- Highlight MOUG’s 501(c)(3) charitable donation tax status at every opportunity.

- Consider approaching corporate OCLC members who have used MOUG members’ (and our employing institutions’) cataloging for their own marketing and other purposes, such as Naxos or

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7 That is, the Papakhian Fund, the “MOUG Fund”—assuming for the sake of illustration that such a thing might also exist independent of the Papakhian Fund—and so forth.

8 N.B.: It will be important for the Board to retain and court donors long-term. Such efforts require planning, which should begin at the same time as any major fund-raising initiative. The Board should immediately begin acknowledging those who have already made donations to the point, as well as those who will give before the initiative begins.

9 (Keeping in mind that only a certain percentage of MOUG members are in a position to take advantage of that status when filing their tax returns—MOUG also needs to remind new and younger members, many of whom do not itemize on their tax returns, that investing in MOUG is an investment in their professional futures.)
New Initiatives:

1. As soon as possible, organize and launch a “First $100K” campaign with the goal of raising $100,000 in capital over the coming five years.\(^{11}\)

   - Begin by reaching out to a group of current and former MOUG Board members going back ten years, both to help raise initial seed money and to assist the Board in spreading the word, generating initial enthusiasm.

   - Conduct an education campaign in the Newsletter and at the next annual meeting (if time permits) to help members understand that $100,000 is believed to be the “tipping point” at which it is safe and affordable for MOUG to **engage professional investment advice** (which might itself be regarded as a sub-initiative, as it will involve expenditures) and also to start investing some of MOUG’s capital in the equities and bond markets, which provide rates of return on investment that generally exceed inflation by significant margins.

   - Consider means by which MOUG may sustain enthusiasm for this initiative over the years it will take to raise $100,000—enthusiasm may be high initially, but donors do lose interest.

   - Consider means by which the proposed group of former Board members, or at least a subgroup of them, might be willing to match donations made by the membership at-large in order to boost enthusiasm (whether initially or at the mid-point of the fundraising, which is the point at which the Papakhian Fund will be considered fully funded).

   Board response: We began by confirming that the Board definitely wishes to stick with the $100,000 figure as the goal, since it has a nice ring to it. We also wanted to make sure that this would be called a capital campaign (which could of course be combined with “First 100K”). We also thought that framing the money raised during Steve’s 2013 pledge drive as “the first 10,000 dollars has already been raised” could be a catalyst to get everything started.

As mentioned under General Assets 5, if interest rates become more favorable, we could adjust the benchmark at which we determine our goal has been reached.

N.B.: The Board observed that in order for any of this to succeed, this effort will need an enthusiastic and motivated person (or group) to lead it. While we certainly want to do a complete scan of the MOUG membership for that individual, we could not help but note that the FPWG already has members that have all the requisite “tools” to spearhead this effort. If any of you feel inspired to take up this role, the Board will support that 100%. Otherwise, we invite you to help us brainstorm names of qualified individuals.

2. Consider engaging high-profile guest speakers to present at annual meetings.

   - The speakers could be engaged in the capacity of “keynote speakers,” particularly if the Board, following the recommendations of the Program Committee, chooses to present a themed meeting around a particular topic in a given year.

   Board response: Agree without comment.

3. Consider funding partial travel expenses for the MOUG/OLAC Liaison to OLAC biennial meetings, following the manner in which MOUG Board travel is funded.

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\(^{10}\) The WG advises caution, because of MOUG’s relationship to OCLC as an official user group and the potential for Naxos, ASP, etc., to break off their own business relationships with OCLC at any point. Care must also be taken to distinguish MOUG clearly from MLA, an organization in which Naxos and ASP are corporate patrons and members respectively—it would be impolitic, for example, to approach Naxos or ASP at their booths in the MLA exhibit. All communication with them, if any, should take place completely away from the MLA meeting and associated events. This is not only to avoid being perceived as competing with MLA directly for funds during the latter organization’s own event, but also to clarify MOUG’s distinct existence from MLA in the minds of potential donors.

\(^{11}\) The WG considers a major fundraising initiative to be itself a new initiative, i.e., a project or program heretofore untied on which to spend MOUG funds, because some expenses will likely be incurred in order to publicize it adequately and to sustain interest and support for it until the goal is met. Please note also that the WG does not here present a very long list of recommended new initiatives because it was felt that “starting small” until MOUG’s assets have grown considerably is an approach more likely to meet with both membership approval and initial success.
• The WG cautions against referring to any such funding as a “stipend” or “honorarium.” The idea is not to pay (in effect, bribe) anyone to do MOUG work, even in a liaison position that has occasionally been difficult to fill (with the notable exception of Mary Huismann’s long and honorable tenure). The idea is merely to reimburse some expenses, especially when a liaison might not otherwise choose to attend a given OLAC meeting were it not for her or his role in MOUG.

Board response: Agree without comment.

4. Consider development of Web-based programming emphasizing practical training and skills-enhancement using OCLC products for music library activities (reference/research, acquisitions, cataloging, resource sharing, etc.). For example: MOUG members could present sessions teaching people to use the various WorldCat interfaces’ more arcane indexes and search strategies to find music resources, something that will become increasingly important as both bibliographic and authority records become deeper and richer due to the addition of information now required (or deemed highly desirable) by RDA. A session devoted to the concept of “edition” as it has been applied (and frequently misapplied) to printed music could be the topic of another program, showing participants the myriad ways in which edition-related data have been transcribed (and mis-transcribed) in the MARC record over the years. A follow-up to that could be a session on how to distinguish among true editions among records in WorldCat for printed music, to choose the best-matching record for the resource one has in hand for copy cataloging purposes. Another possibility might be a session on using the many available OCLC macros in the Connexion client for searching, editing, and record creation (which of course in records for music materials are known for their related complex authority work and lengthy, detailed contents notes), in both bibliographic and authority records. And so on.

• Funding will likely be necessary for the technology infrastructure, especially for interactive events (as opposed to, for example, static PowerPoint presentations). Such programming would be aimed as much to potential MOUG members as to current ones, and not be tied to the annual meeting. It may also be desirable to form a new MOUG committee to plan the work and handle the associated logistics, as it would likely be too much simply to add directly to the Continuing Education Coordinator’s responsibilities (though the CEC might serve as the group’s official liaison to the Board).

Board response: We agree with this recommendation. As a way to help realize this goal on the technical side, we wondered if we could utilize OCLC infrastructure to carry out this training.

(Next steps): Jay commented that he will be happy to investigate.

We expanded this out further by noting the potential to have our webinars advertised through OCLC’s marketing structure, such as the e-newsletters they send out on a routine basis.

To help realize the content aspect of this goal, we felt this task fell naturally under the auspices of the Continuing Education Coordinator. This goal could also create the opportunity for another BCC-MOUG co-sponsorship.

(Next steps): The Board will discuss all aspects of New Initiative 4 in greater detail at our October Board meeting.

Members of the Financial Planning Working Group:

Neil Hughes, Chair
Stephen Luttmann
Casey Mullin
Nara Newcomer
Mark Scharff

12 The WG wish to offer a friendly reminder to our fellow MOUG members, if not necessarily the Board, that care must always be taken not to encroach on Web-based educational outreach programs done by MLA in partnership with the American Library Association (ALA), nor indeed any other MLA offerings, especially those aimed at raising much-needed funds for the MLA budget. By focusing solely on OCLC products and services as they relate to music, and by offering (where possible) free training in partnership with OCLC, MOUG may be able to carve out a distinct niche using funds raised directly from our own membership. Frequent and regular communication with MLA’s Education Committee is strongly encouraged should this proposed initiative be pursued.
It was a treat to see so many of you in Kansas City at the 2014 joint OLAC-MOUG Conference. We had 159 in attendance, which included 56 first-time attendees!

Thanks to all of our speakers and workshop presenters. We had some new things to consider at this conference (Linked Data, BIBFRAME, oh, and RDA). Among many other things, we learned much about the provenance and data-trail of the 1946 movie *The Beast with Five Fingers*, how RDA has fared since the 2008 OLAC Conference, and whether a stuffed beaver in Alaska could be considered a duplicate copy bibliographically of a stuffed beaver in Wisconsin. Congratulations go to Michelle Hahn for winning the “little tea-pot” raffle which benefited the *OLAC Conference Scholarship fund* and the *MOUG Ralph Papakhian Travel Grant fund*. Over 100 tickets were sold!

Many thanks also to the other members of the Local Arrangements/Program Committee for all their hard work:

Richard Baumgarten, Merry Bower, Margaret Corby, Felicity Dykas, Michelle Hahn, Mary Huismann, Evelyn Pypes, Kathleen Schweitzberger, and Michelle Turvey-Welch.

The Conference Reports in this newsletter will cover all the workshops, keynotes and sessions in detail. We are still gathering workshop handouts and other presentation materials, but what we currently have are available on the website: http://olac2014.weebly.com/

Thanks for visiting Kansas City! You can see some of the pictures of the conference on the OLAC Facebook page.

Looking forward to seeing everyone again in 2016!

—Wendy Sistrunk, Chair
Local Arrangements/Program Committee

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**CONFERECE REPORTS**  
*Coordinated by*  
Jan Mayo, East Carolina University

Handouts and further information for most of the sessions can be found here: http://olac2014.weebly.com/. Hover over the Program tab and select the type of presentation you want to see. *Editor’s note: Some workshop reports have been edited for space considerations.*

**Preconference workshop**

**NACO-AV WORKSHOP**

*Presented by*  
Peter H. Lisius, Kent State University

The approximately 45 attendees at the daylong conference concentrated on three types of Authority Access Points: personal names (X00), corporate names (X10), and titles (X30); not covered were meeting names (X11), family names (X00 3_), name/title combinations, names of jurisdictions/ geographic names (X51), or any in-depth instruction on heading construction under AACR2r.

The format was a bit show and tell, Town Hall, and Q & A. Access point construction in RDA was based on film and electronic resources. There was a live demonstration in OCLC and each type (personal, corporate and title) was taken in RDA order.

Peter considers these three tools essential for catalogers: 1) RDA Toolkit, 2) MARC 21 Format for Authority Data
OLAC-MOUG Conference Reports, continued

(www.loc.gov/marc/authority/), and 3) the Library of Congress Descriptive Cataloging Manual Section Z1 (DCM Z1) Instructions (www.loc.gov/catdir/cpso/ dcmz1.pdf). Catalogers should use the DCM Z1 in consultation with the Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PS; found here in HTML (www.loc.gov/aba/rda/lcps_access.html) but also in the Cataloger’s Desktop (description and subscription available at http://www.loc.gov/cds/desktop/). Access to OCLC Connexion is indispensable and there are hyperlinks to OCLC’s Bibliographic Formats and Standards (4th ed.) via the MARC Field Help button.

Starting in the RDA instructions, Section 3, Chapter 8: General Guidelines on Recording Attributes of Persons, Families, and Corporate Bodies, Chapter 9: Identifying Persons, and Chapter 11: Identifying Corporate Bodies were presented in great detail and discussed. RDA to MARC Authority mapping and vice versa (MARC Authority to RDA mapping) was also discussed, especially because sometimes there is one-to-one correspondence; in other instances, one RDA element is equivalent to more than one MARC 21 element. These mappings can be found in the RDA Toolkit “Tools” tab.

Peter demonstrated the Kent State macro used to create NARs (Name Authority Records) in OCLC Connexion, and with it all of the personal/corporate name MARC Authority attributes in the 37x fields. Referring to RDA authority records, he said, “We are thinking about this data a lot differently than we used to.”

Using RDA Chapter 9, catalogers can and should consult Appendix F: Additional Instructions on Names of Persons for instructions on specific languages for persons who bear names derived from a non-roman script or non-roman alphabet language.

Core versus not core elements: RDA does not require any categories of variant access points. The Library of Congress policy is to use cataloger’s judgment, period. As a cataloger, you consider what users need to find the authorized access point. Choose the most commonly known form, treat the others as variants.

To be documented in a Name Authority Record, the cataloger must have justification either in a 670 field or individually qualified in $v of each attribute field. Peter’s personal preference, “justify as much as possible in 670 fields.” Consider birth and death dates, and period of activity core elements; also core is a person’s vocation or avocation when the person’s name doesn’t otherwise convey the idea of a person, or use it to differentiate from other persons, e.g., 100 1 Burke, Katherine $c (Theatre director)

Personal name NAR fixed fields were spoken of and examples were projected to review, including those fixed fields that never vary and those that do.

Participants were treated to a hands-on demo for the DVD titled Google and the World Brain which was already cataloged, but needed authorities created.

The afternoon was spent on Chapter 11: Identifying Corporate Bodies, with continued and reinforcing conversation about core elements, sources of information, different forms of the same name of the corporate body (11.2.2.5), etc. Discussion of the need to have the name of the higher body when confronted with “Bureau”, or “Department” or similar ilk may lead to ‘going down the rabbit hole’ where one problem leads to another and another and the cataloger not knowing when or where to end the authority work.

The afternoon hands-on demo was the movie titled Secondhand Pepe. Searching the Internet left the participants unsure as to what to do; using the production website and the other websites lead to conflicting or unresolved information. Let’s just say that this one remained a work in progress.

Lastly, Peter tackled Motion Pictures and Television Program Access Points. There is still much ambiguity now with the documentation as provisional, but it would seem that the use of qualifiers and dates in the 130 0_ field such as King Kong ( Motion picture : 1933) and King Kong ( Motion picture : 1976) will be helpful to our users.

In actuality, it all comes down to access, use and familiarity of cataloging tools by new and experienced catalogers to create, code, and update machine readable name authority records (NARs) in the LC/NACO authority file (LC/NAF) with relevant MARC coding/tagging as applied to RDA access point construction.

At the end of the workshop, participants were asked to participate and begin contributing headings to the NACO AV funnel project, or become reviewers of authority records that others were creating. The future of this project would be benefited by an assistant coordinator. If you have the desire to participate in the funnel, or as a reviewer, then contact Peter at KSU.

—Reported by Kristin M. Jacobi
Eastern Carolina State University

December 2014
MOUG Newsletter
No. 118
MENE, MENE, TEKEL, UPHARSIN: OR HOW I LEARNED TO STOP WORRYING AND LOVE THE BIBFRAME

Opening Keynote Address
by Philip Schreur
Stanford University

In his position as Head of the Metadata Department and as Metadata Strategist at Stanford University, Philip Schreur is ideally situated to introduce us to the scary world of BIBFRAME. Much like BIBFRAME proposes to link what at first may appear to be unrelated elements, Philip skillfully links his love of music and classic horror films into an interesting, informative, and entertaining presentation in which he presents the concepts behind linked data as well as its practical applications, providing support for the argument that we must rethink and reevaluate how we record and present data to the public.

Philip opened his talk by taking us back to his childhood in Chicago, absorbed in the world of “Creature Features” and its presentation of classic horror films. It was here he was first introduced to the concept of “The Moving Hand” and “The Writing on the Wall”, and it was through these films that he developed his love of classical music. Both of these themes are intertwined throughout the remainder of his talk, and both are used to demonstrate aspects of linked data.

Of course, as a child, linked data meant little to Philip, but his imagination was captured by the music in the film *The Beast with Five Fingers*, which was credited to Max Steiner. He used this to illustrate that had linked data been available, he could more easily have learned what it took him the better part of the next 10 years to discover, that Steiner had adapted the film’s music from a piece by Bach arranged for the left hand, which had, in turn, been adapted from Brahms.

Philip also commented on how the theme of the moving hand or the writing on the wall has a long, linked history. First appearing in the Book of Daniel, and later in the *Rubaiyat* of Omar Khayyam, it implies impending change and a reckoning, and Philip used it not only to illustrate his talk, as his theme as well. The implications are that cataloging has reached a crossroads, and that to advance we must change our current practices and perspective, bringing our work to the web. We must reassess and reevaluate not just what we do but how we do it, recognizing that in the modern, linked data world of the Internet, the data we record needs to go beyond the simple statement of facts about a resource and that BIBFRAME is an attempt to address this need.

The traditional catalog record is designed to record facts about the resource. The linked data structure of BIBFRAME places the emphasis on making connections to other information related to the resource, leading patrons to further discoveries. Much like the XML on which it is based, the BIBFRAME AV model is extensible, and can be tailored to specific communities’ needs.

In conclusion, Philip emphasized that the strength of the BIBFRAME model lies in the linking of the data. This linking is where the future lies, in links provided not only by ourselves but by our users, creating an complex, interlinked database that can retain the basic resource information with which we are familiar, yet one which can grow organically, encompassing the needs and expectations of a growingly inter-linked world.

—Reported by Barbara Tysinger
University of North Carolina at Chapel Hill

THE SKY IS NOT FALLING:
QUESTIONING ASSUMPTIONS ABOUT THE FUTURE OF SPECIAL FORMATS CATALOGING

Closing Keynote Address
by Casey Mullin
Stanford University

Casey Mullin, Head of the Data Control Unit, Stanford University Libraries, began with Heidi Hoerman’s prediction in her closing keynote for the 2008 OLAC Conference that “RDA is dead.” At the time, there was a fair amount of negativity surrounding RDA becoming a reality, but was Heidi right? The answer is obviously no. Assumptions about RDA included that it would be like putting old wine in new skins because of the AACR2 baggage, that implementation was uncertain, that the concept of core would be problematic, that MARC would have to die, and that MARC’s successor (BIBFRAME) would be a panacea.
Casey gave a little of his own history that lead to his becoming a librarian and how his interests have kept him on the leading edge of new developments since his graduation from library school. He shared a timeline for RDA that showed its steady movement forward, despite opposition, from early 2008 until it was finally implemented by the Library of Congress in April 2013 and beyond. He discussed new initiatives to revise and expand RDA and it universally available. The advent of RDA has meant that MARC has needed to be tweaked a lot and is unlikely to die for quite some time yet.

He also discussed new developments in FRBR and FRAD and mentioned several subject thesauri that are coming into being to provide better discoverability of materials. He talked about the options being explored that will take us beyond MARC.

While RDA brought some improvements to the cataloging process, in that it is less particular, allowed more approved sources of information and more granular relationships, which fields are core has led to some problems. It did not necessarily make for shorter bibliographic records, however, because catalogers are not as bound by the rules as they were in AACR2.

There is a still a lot of work to be done on BIBFRAME before it can become the new standard, including ways to convert legacy data, new cataloging interfaces, sharing mechanisms, storage methods and displaying results.

To wrap up, Casey stated that RDA, far from being dead, is here to stay. MARC will also stay for a while, because BIBFRAME is not yet ready for prime time. In the meantime, there is still lots to catalog. His call to action for catalogers is 1) link more, type less; 2) do more authority work; 3) participate in standards development; 4) collaborate with technologists; and 5) keep cataloging! He contends that the sky is not falling, it’s rising.

—Reported by Jan Mayo
East Carolina University

Kelley McGrath, Metadata Management Librarian at the University of Oregon, gave a presentation on Identifying and clustering moving images works found in manifestation-based MARC records. She discussed her research plans on a prototype moving image record using a work-centric view. Unfortunately, this type of record cannot be based on MARC.

Instead, an automated tool is needed to look at the manifestations and see what works are presented. This tool should divvy up the data in the MARC record, which can contain multiple manifestations, expressions, and works. Then it should group equivalent entities and de-dupe. Some of these entities can contain more than one work.

She next described various FRBR tools that are available to create this type of record including:

- **LC FRBR display tool** matches based on author and title, or if author not available, just title.

- **OCLC FRBR work-set algorithm** processes in this order: author and title, uniform title, title and name, and title and OCLC number.

- **MARC2FRBR conversion tool** (from Norway) identifies the different entities in the MARC record, selects the fields that describes the entities, finds the relationships between the entities, and supports normalization by finding and merging equivalent records.

- **INESC-ID** (from Portugal) uses string similarity for matching instead of exact string matching. This is a looser type of matching, and is good for typographic errors and variations in the arrangement of words.

These tools are not perfect. The data processed is incomplete, inconsistent, inaccurate, and missing. Some data is in free text, such as roles. Additionally, expressions and multiple works within a single manifestation are difficult to identify. In fact, OCLC determined that it could not identify expressions solely on MARC records, but instead that they had to look at some items.

In her research, Kelley has discovered that algorithms that use more than one match work better. Unfortunately, many moving image records do not have a 1xx field. The solution may be to add more match points such as title, original
If there is more than one version of a movie (such as Hairspray), catalogers should create more than one uniform title.

For different DVD versions (Blu-ray, deluxe ed., etc.), multiple related 775/776 fields for each version are necessary.

Relator terms are book-centric. For games, “creator” is probably the best option to indicate the role of the individual responsible. Additional 700 and 730 fields can be added if the game is based on another work.

Relationship terms are lacking for audio. In Appendix J of RDA toolkit, there is no mention of audio being an expression of the text. 776 fields can help identify the version.

Additionally, Bobby raised the question of how much is too much. For a movie series such as Star Wars, how many prequels and sequels should be defined? And for movies that have several adaptations (graphic novel, theatre, libretto, etc.) as in Les Misérables, how many 775/776 are needed and how many are too many?

This presentation left the audience thinking about RDA and relationships, and how RDA had some shortcomings in regards to non-print materials.

—Reported by Lisa Romano
University of Massachusetts Boston

POSTER SESSIONS

The hall was buzzing with activity and discussion as colleagues presented their poster presentations with exciting new ideas and discoveries.

“That Doesn’t Look Right!”: Identifying Bootleg DVDs of Asian-language Films -- Shay Beezley and Emrys Moreau, University of Central Oklahoma

This poster presentation was all about how to identify illegal reproductions of DVDs. The Max Chambers Library at University of Oklahoma received a large donation of Asian film DVDs, mainly produced in Hong Kong and mainly without English subtitles or soundtracks. After cataloging a few of the DVDs, the catalogers suspected that some of the DVDs were illegal reproductions. Of course, they did not want to add such DVDs to their collection. They created a list of evaluation criteria to determine whether or not the DVDs were illegal reproductions. They handed shared a very useful postcard with the “12 Criteria for Identifying Bootleg DVDs of Asian Films.”

The Challenges of Maintaining a Merged Bibliographic Catalog -- Sarah Hess Cohen, Florida State University

Two years ago, a decision was made for each of the Florida State University libraries to merge their catalogs,
which meant that 11 individual Aleph catalogs were combined into one union catalog. Catalogers from these libraries are still grappling with the fallout from this decision. It is obvious that they had to come up with a set of common standards with which to move forward with consistency across the libraries. Some of the problems that arose included trying to merge records, some of the more problematic records being those for music scores and audiovisual materials. These records, in particular, contained differences in record format, variable fields, access points, and varying degrees of authority control. This poster presentation discussed how the catalogers developed a formula for the best possible access for patrons seeking music and other audiovisual materials. Re-establishing authority control and creating routines to eliminate duplications and format errors were among the most important pieces for best discoverability.

**Metadata Digitization and Streaming for Libraries -- Cyrus Ford, University of Nevada, Las Vegas**

The point of this poster presentation was to demonstrate how online education and libraries can provide an online video library for library users and distance education students. Distance education students and library users can view videos through virtual learning environment systems and library websites. This poster presentation also discussed the technical aspects of making streaming videos available to library users.

**Roles & Reels: An Exploration of Roles Found in Film and Video Records -- Kelley McGrath, University of Oregon Libraries**

Kelley McGrath is well known for her work with the OLAC Movie & Video Credit Annotation Experiment, where she continues her efforts to teach computers to identify names and roles in free text from the 245 $c, 260 $b, 264 $b, 508, and 511 MARC fields and subfields. This poster presentation brought to light some of her findings from that project. The type and distribution of roles found in bibliographic records for moving images were presented. Also, the examples of credits that are difficult for both machines and human beings to interpret were discussed. She asked intriguing questions, such as: should we use an IMDb-style solution? How detailed should we really be going with these roles? (There are so many roles listed in credits, such as these that Ms. McGrath provided: anthropological consultants, architectural consultant, dancing directors, garden designer, synchronization director, and tiger trainer.) What do we do with roles that are vaguely presented? How do we deal with statements that we human beings do not know how to interpret? And if we cannot interpret them, how can a computer be taught to interpret them? She also brought forth implications for the use of relationship designators in RDA.

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**OLAC-MOUG Conference Reports, continued**

**Lightning Talks**

Lightning Talks proved to be an energetic and informative session for the audience and speakers alike. It’s format of five-minute presentations kept the atmosphere fun and dynamic as the eight speakers shared their insightful ideas on a variety of topics, highlighted new projects, and discussed practical solutions.

**Saving Orphans, One VHS at a Time: the Story of Section 108 at the University of Connecticut Libraries -- Jennifer M. Eustis, University of Connecticut**

Jennifer introduced the audience to the story of the realization of Section 108 of the Copyright Act at the University of Connecticut Libraries. Section 108 permits libraries to reproduce one copy of an orphan work for preservation, replacement, or patron access. She explained that about two years ago, the university stopped supporting VHS format on the campus. This decision was very inconvenient for some of the faculty who had continued using the VHSs for their classroom instruction. In order to remedy this, the Course Reserve Coordinator initiated a project to attempt to save and transfer the content from some of the VHSs to DVDs. Jennifer outlined the process steps that evolved as a result of this effort: 1) identify VHS; 2) determine if VHS qualifies as an orphan
work; 3) if yes, transfer content to DVD; 4) send VHS and DVD to Cataloging; 5) withdraw VHS and send to Archives and Special Collections for preservation; 6) create special jacket cover tailored for Section 108; and 7) send DVD to permanent reserve.

As a result of this process, the faculty and students continued to have access to the content with the newly created DVDs for their educational purposes.

Using “Tasks” in MarcEdit to Do Your Dirty Work -- Margaret Corby, Kansas State University

MarcEdit is a very popular tool for clean-up projects. It is regularly used by many professionals to perform the same edits for groups of bibliographic records. Using a list of the Naxos bibliographic records as an example, Margaret offered a live demo of the MarcEdit Task tool, in order to automatically run such edits. The following steps were demonstrated in order to use the tool: 1) click on the Tools tab and open Manage Task; 2) create a New Task List (e.g., Naxos); 3) highlight the list of the Naxos records, after that the program will automatically open the Edit Task window; 4) select Add Task and add all the tasks you want (e.g., add, delete, replace fields, subfields, etc.); and 5) save your tasks and run the edits.

Impact of Metadata on Accessibility of Digital Collections -- Teressa Keenan, University of Montana

The image can talk. This is possible. Teressa demonstrated a powerful solution for blind and visually impaired library users accessing and exploring digital image collections. By using the JAWS (Job Access With Speech) screen reader program, they can listen to synthesized speech of the audio description of a particular photograph or image. She emphasized that by providing high quality descriptive metadata, offering descriptive linking, utilizing content management system functionality for controlled vocabularies, and furnishing the configuration of metadata fields by moving the most important to the top, barriers can be removed for the different user groups to significantly improve the discovery, access, and navigation of image collections.

Promotion of E-books Using QR Codes -- Dana Tonkonow, Central Connecticut State University

QR codes can benefit libraries by connecting growing e-book collections with users. Dana Tonkonow shared the idea for promoting e-books by using QR codes and creating e-book displays on the shelves around the Burritt library. Users could access an e-book record in the catalog by scanning the code on their mobile devices. Reaching that goal, Dana evaluated a number of freely available QR code generators and selected the following service for the project: FreeQrCodeTracker (www.freeqrcodetracker.com/).

In a short demonstration, Dana walked the audience through the entire process of creating a QR code with a link for an e-book cover image: 1) select an e-book title, access the book, and take a screen shot of the cover; 2) clean up the image in Microsoft Paint; 3) copy and paste the image into a Microsoft Word document; 4) enter a persistent URL associated with the title into the QR code generator and create a code; 5) copy and paste the image of the newly created QR code into Microsoft Paint in order to capture the QR code; 6) add the QR code image to the e-book cover image in the Microsoft Word document; and 7) print and insert the document into an acrylic frame and display on the bookshelf. The majority of work in this project was performed by student assistants.

Streamlining Music Cataloging: Procedures and Corresponding OCLC Macros -- Melissa Burel, Southern Illinois University Edwardsville

Efficiency in cataloging is a very important topic. It is very clear that cataloging procedures are essential components of the task-related techniques that provide consistent directions and save a lot of time for staff members. Also, they record institutional knowledge and can be used as an effective training tool. Melissa suggested methods for streamlining the cataloging workflows by incorporating corresponding macros (programmed scripts) into procedures. She recommended the following places to find macros: 1) OCLC Website: https://oclc.org/support/services/connexion/macros.en.html; 2) Better Living Through Macros by Joel Hahn: http://www.hahnlibrary.net/libraries/oml/; 3) Walt Nickeson’s macros: https://docushare.lib.rochester.edu/docushare/dsweb/View/Collection-2556

Utilizing macros can help simplify procedures, improve efficiency, reduce errors and inconsistencies, and save time. Melissa also provided useful tips and examples for bringing together the procedures and macros, such as: 1) researching the availability of macros for your needs, reading the literature and exploring surveys, and trying to create your own macros (e.g., macros created by Melissa: AACR2-RDA e-books, AACR2-RDA DVDs); 2) organizing your macro books and creating a central location for macros and procedures; and 3) pairing macros with a particular procedures/staff member.

Learning about Linked Data through a Zine Thesaurus -- Tina Gross, St. Cloud State University

Tina Gross shared her experience of taking a part in a linked data project of the Upper Midwest Linked Data
Interest Group, which is composed of a number of enthusiastic and highly motivated professionals. The aim of the project was to make the Anchor Archive Zine Thesaurus available as linked data in the Open Metadata Registry (metadataregistry.org/uri/aast). Gross discussed her experience working with: the Anchor Archive Subject Thesaurus, which was originally developed for a special collection of zines in Halifax, Canada; the Open Metadata Registry, which allows publishing metadata schemas on the Web; and Open Refine service for cleaning up large metadata sets. Gross also explained the rationale for selecting The Open Metadata Registry for the project its very simple interface, ability to create URLs for vocabulary terms, vocabulary expression in RDF (SKOS), relationship mapping within the Subject Thesaurus, and overall ease of use.

Mining for Moving Image Data in MARC -- Kelley McGrath, University of Oregon

Kelley McGrath shared the results of a project that attempted to find a way to get FRBR work data out of MARK records for original movies. The goal of this project was to improve the discoverability of original movies by transforming the data into a standardized form and making it machine readable on the operational levels (e.g., searching, limiting, targeting, etc.). She provided the audience with a few examples and explained in extremely clear terms the importance of the following machine-actionable data in their MARC records:

- original date: 046 $k
  046 $k 20141024

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Purchasing and Licensing Models of Streaming Videos for Libraries -- Cyrus Ford, University of Nevada, Las Vegas

Due to the growing popularity of streaming videos, a number of commercial vendors have started offering expanded streaming video resources for libraries. Collection development and acquisition processes in many libraries embrace numerous challenges, such as: licensing options, quality of content, issues with hosting, capacity and duration, technical support, and maintenance. Cyrus Ford provided a brief examination of the key issues involved in the purchasing and licensing of streaming and on-demand videos. He outlined three major purchasing models for building collections: 1) buy once and use in perpetuity, 2) subscribe annually, or 3) subscribe for a fixed term (the current practice). Finally, he pointed out a wide range of licensing models available for libraries, such as: Flat Fee, In-Perpetuity Licensing, Flat Fee Term, Variable Fee Term, Graduated-Fee Term, etc.

—Reported by Irina Stanishevskaya
University of Alabama at Birmingham

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CATALOGING 3D OBJECTS AND 2D GRAPHICS USING RDA AND MARC 21

Presented by Julie Renee Moore
California State University, Fresno

In an era of increasingly non-tangible resources, this workshop brought participants back to the roots of the audiovisual cataloging enterprise. Julie Renee Moore, 2010 recipient of the Nancy B. Olson Award, encounters unusual special formats materials when she catalogs the educational resource materials at California State University, Fresno. Her subtitle, “(the fun, touchable stuff!),” was an accurate description as participants were able to examine and handle the very objects that Julie often discusses on OLAC-L.

She summarized the major changes that catalogers have been adjusting to in the transition from AACR2 to RDA, focusing on the replacement of the general material designation (GMD) by content, media and material types, encoded in tags 336, 337, and 338. She followed with an explanation of extent, and carrier description for a number of different items. There was a spirited discussion of the difference between content type “three dimensional object” versus “tangible three dimensional object” since practically all 3D objects invite some type of handling. Julie interprets “tangible” as pertaining to the sight-
impaired community (analogous to braille) unless the resource specifically directs the user to learn from direct touch. She reviewed instructions for the preferred source for titles and the 264 production, publication, etc. statement. She shared her challenges with recording this information without “agonizing” or circling down the “Cascading Vortex of Horror.” She suggested that we consider linking to photographs to further describe the resource in an 856 field, a recommendation that the reporter heartily approves.

Unfortunately, time expired before Julie was able to fully discuss 2D materials; she pointed out a dilemma in MARC coding between games and cards. The example is a set of paper dolls, which blends aspects of both.

Participants were able to immediately apply the principles with a practice record, and Julie provided handouts of ten fully cataloged records, and code lists. The discussion was lively. In the best tradition of OLAC workshops, Julie Renee Moore’s presentation will serve both new and experienced catalogers helpful direction for cataloging these formats.

—Reported by Scott Dutkiewicz
Clemson University

ATALOGING AUDIO RECORDINGS WITH RDA
Presented by Mary Huismann
University of Minnesota

Two sessions of Cataloging Audio Recordings with RDA—on October 23rd and October 24th—were presented. The objectives for her presentation were: to gain an understanding of the differences between AACR2 and RDA cataloging for audio recordings, to locate RDA instructions pertaining to audio recordings in the RDA Toolkit, to identify MARC21 fields created to accommodate RDA elements, and to learn about music cataloging resources that supplement RDA instructions pertaining to audio recordings. Due to time restraints, classification, medium of performance/genre-form, construction of access points and authority records were considered out of the scope of the presentation and not discussed. The focus of the presentation was on cataloging compact discs, unless otherwise specified.

RDA provides a new way of thinking as compared to AACR2. The differences between the two descriptive cataloging standards were compared and contrasted. Some of the changes are technical, such as the loss of the General Material Designation. Other changes involve the use of new terminology. In RDA, the term “heading” is now “access point” and the terms “sound recordings” and “sound discs” have been replaced by “audio recordings” and “audio discs.” FRBR terminology is also now incorporated. Compared to AACR2, RDA relies more heavily on cataloger’s judgment so there may not always be a single, correct answer. Mary also summarized the RDA core elements. These elements are considered to be the minimum information required to describe a resource and should always be included in the record (if available).

She noted that the LC and PCC have established additional core elements.

After the introduction to RDA, preliminary cataloging decisions such as the creation of a new record, type of description, and sources of information were reviewed as they pertained to audio recordings. Relevant RDA rules were cited and explained. Following the preliminary cataloging discussion, the majority of the presentation focused on descriptive cataloging using the MARC21 format. Although mostly unchanged from AACR2, the leader and fixed-length data elements specific to audio were reviewed. RDA description for the MARC21 variable fields was discussed in MARC21 order with extra detail devoted to the selection and recording of the title (or titles), the statement of responsibility, the publication/production/distribution/ manufacture, dates, the recording of the content-media-carrier types (MARC21 336, 337, 338), and relationships.

An optional section on spoken word recordings, streaming audio, or “funny formats” such as SACDs, DVD audio, Blu-ray audio, or enhanced CDs are covered in detail in the PowerPoint slides. In addition to the RDA Toolkit, resources cited for further consultation concerning the cataloging of audio recordings include the Music Library Association’s Best Practices for Music Cataloging using RDA and MARC21 (2014) http://bcc.musiclibraryassoc.org/BCC-Historical/BCC2014/RDA%20Best%20Practices%20for%20Music%20Cataloging.pdf, the MLA webinar series, and Music Cataloging at Yale http://www.library.yale.edu/cataloging/music/musicat.htm.

—Reported by Dana Hanford
Central Connecticut State University
OLAC-MOUG Conference Reports, continued

CATALOGING SCORES
Presented by Margaret Corby
Kansas State University

Margaret began by noting that the content for this presentation was jointly developed by Kevin Kishimoto (University of Chicago), Nancy Lorimer (Stanford University), and herself. She clarified some topics that were out of scope for the presentation, including creating authority records, LC classification of music materials, Medium of Performance terms for music, form/genre headings for music, and subject headings for music.

A short introduction/remind followed addressing “Why RDA?” It is a content standard. It tells us what information to record or transcribe, but not where to record it or how to display it. RDA will theoretically be more compatible with linked data technologies, is somewhat more format agnostic, and the information can potentially be better used by communities outside of “library land.”

There was a pretty substantial change in structure from AACR2 to RDA: RDA is not organized by format, and it is based on the FRBR model. You use the data elements that are relevant to the format you are cataloging.

Margaret took us through a short tour of the RDA Toolkit organization as well as going over some RDA terminologies. She also noted that sometimes we are instructed to record information (“encode data according to guidelines, but not necessarily how it appears on the resource”) and other times are instructed to transcribe it (“take what appears on the source of information (apply general guidelines on capitalization, punctuation, symbols, etc.).”) RDA, in general, gives us a bit more leeway and room for cataloger’s judgment than AACR2 did.

It was pointed out that the MLA Best Practices for Music Cataloging document in the Resources tab of the RDA Toolkit, is now also in Cataloger’s Desktop, and can also be found on the MLA BCC website (http://bcc.musiclibraryassoc.org/bcc.html). The PCC RDA BIBCO Standard Record (BSR) Metadata Application Profile was also pointed out as a useful resource (http://www.loc.gov/aba/pcc/scs/documents/PCC-RDA-BSR.pdf).

Margaret then proceeded to go through several examples of scores, element by element. She very clearly covered selected elements, including what RDA tells us about how to record or transcribe the information, capitalization issues, whether the element is core or not, sources of information, and any major changes from AACR2 to RDA.

—Reported by Amy Pennington
Saint Louis University

MAPS CATALOGING
Presented by Paige G. Andrew
Pennsylvania State University

Paige Andrew, Maps Cataloging Librarian at Pennsylvania State University, led the highly-informative two-part workshop focused on describing maps with RDA. Because of the new RDA guidelines, both brand-new map catalogers (such as myself) and seasoned map catalogers gleaned new information. The workshop was divided into a two-part session with both a morning and afternoon portion. Andrew provided every participant with a folder of 50+ pages of cheat sheets, workflows, and reference material. These handouts included material discusses in the workshop as well as additional information for further study.

Andrew began explaining important resources for cataloging maps including the RDA Toolkit, RDA and Cartographic Resources (2015), Cataloging Sheet Maps: the Basics (2003), the Library of Congress’ Map Cataloging Manual (1991). He also made note of the “must-have” tools for map catalogers – both physical tools, such as a scale finder, tape measure, hand calculator, and magnifying glass – and online tools, such as the Klokan Technologies bounding box and Geographic Names Information System.

Andrew then introduced maps. Maps 1) present information graphically and 2) represent a three-dimensional surface on a two-dimensional surface. The latter means maps include scales and projection information. Descriptions of maps can prove a little tricky. Many times, maps contain a main map with other ancillary maps provided for assistance. Other times, there may be multiple main maps, or a main map that is divided into sections (such as the front and back of a sheet). Differentiating between map maps and ancillary maps is the first step in deciding which parts of the map receive more descriptive attention.

Andrew continued by going through the main descriptive elements for a map catalog record. For title information, maps can be a little hairy. Some maps (like CIA maps) have a very straightforward title. Others rely heavily on cataloger’s judgment, whether because the map contains...
THE PROGRESS OF BIBFRAME

Presented by Angela Kroeger
University of Nebraska at Omaha

Early on, first-time OLAC attendee and presenter Angela Kroeger set the tone of the talk. She made it very clear that she is not actually a practitioner or using BIBFRAME and that the presentation was going to be very academic in nature. Angela also made it very clear that she is not a practicing cataloger but more focused on archives.

The presentation started off with a brief history of the purpose of BIBFRAME; that is, to be a replacement for the venerable MARC format. The main difference in that rather than a “flat” file of text strings, it is more a collection of links of data and descriptors as to what that data is, the main purpose being able to “reconstruct” data images and search results based on the user’s needs; in other words, to be more dynamic and less static as a resource tool.

The presentation then proceeded with a chronological history of BIBFRAME along with a very brief discussion of its genesis with the Library of Congress (LC) and its now defunct contract with Zepheira, the company that LC contracted with to get the ball rolling on the basic design of a structure to replace MARC. Angela also stated that various ILS vendors no doubt will develop their own BIBFRAME tool and that Stanford, Cornell, and Harvard Universities are working on a suite of open-source software; Stanford has already moved to a BIBFRAME environment, a fact confirmed in private discussions with attendees from that institution. A concept that slowly revealed itself and became more pervasive as the presentation went along, is that BIBFRAME is just a part of a larger linked-data universe in libraries; there are, and will be, competing and hopefully compatible structures in the library universe that will help libraries and librarians better organize and present data.

One of the most demonstrable parts of the presentation was showing what a linked data environment can do in terms of data manipulation and presentation, making very clear that it is up to the vendor, or organizer of a particular environment how they want to present the results of a user query. Ultimately, it would be conceivable that the results presented would be dynamic based on the environment and the cataloger does not need to include projection information in the description.

For dimensions, catalogers measure from the neatline, the border that denotes the extent of geographic data on a map, and record the measurement in centimeters (e.g., 23 x 43 cm). Dimensions are listed as height followed by width and the cataloger is instructed to round up to the full cm measurement (similar to monograph heights). If the map is intended to be folded (such as a state highway map), the folded dimensions should be recorded as well. If the graphic extends outside the neatline, catalogers should measure from the ends of the graphic. Providing the sheet size is optional, but catalogers may want to include it if the map covers two sides or if the map covers less than half the sheet.

For recording dates, Andrews advised recording the date of situation. This is commonly the latest date, but not always. For example, if a cataloger is describing a 1066 map of England that was reprinted in 2014, s/he should record the 1066 date for the call number.

Another major change with RDA is the inclusion of the 336, 337, and 338 fields. For most sheet maps, these are recorded as “cartographic image” in the 336, “unmediated” in the 337, and “sheet” in the 338 field.

—Reported by Nicole G. Smeltekop
Michigan State University

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OLAC-MOUG Conference Reports, continued

user’s needs. Some possibilities for linked data were discussed; fortunately, Angela chose not to go into the whole “linked data triples” discussion, a topic that, while important to understanding the underlying theory behind linked data, seemed to be outside of the focus of the presentation; in essence, this is what it CAN do, not why it does it.

There were some discussions about how BIBFRAME supports the FRBR model and some dictionaries, terminologies, and how it can play with other structures. Some in attendance disagreed that linked data was a good thing due to the non-permanent nature of said data (an example often used was that of the Virtual Internet Authority File, or VIAF) and that some of the FRBR definitions mean different things to different people, but therein lies the benefit of BIBFRAME; it can be configured, and adapted, by the organization designing and using it, to store, access and provide information to users.

Personally, it was the last portion of the presentation that held the greatest excitement, that of actually seeing BIBFRAME in action and working with it. Angela presented some web sites with demonstrations and comparison tools, not all of which are from the Library of Congress. Along with a converter that is packaged with Terry Reese’s ubiquitous MarcEdit tool, there is also a converter at the official BIBFRAME website. While only providing a conversion, they allow the novice and the experimenter alike to view traditional MARC records in a potential BIBFRAME environment. Particularly intriguing was the Zepheira prototype BIBFRAME editor and the Libhub initiative where Zepheira seeks to take MARC records created in any cataloging standard (even AACR1) and put them in a large shared database to “play” with, sort of like a sandbox arrangement. There was speculation on what Zepheira intends to do with this amalgamation of records from different types.

Angela concluded with a road sign that said “The future of cataloging construction ahead. Have a nice day.” This presentation was a solid introduction to that future without getting bogged down in a lot of technical details and “back office” topics that, to be honest, some practitioners do not care about. While there were some technical topics and terms presented, the presentation was clearly the most useful for those who want to “dip their feet” into the BIBFRAME waters and take the tool out for a spin to see what it is all about.

—Reported by Scott Piepenburg
Valdosta State University

ADVANCED VIDEO CATALOGING

Presented by Jay Weitz
OCLC

Jay Weitz, Senior Consulting Database Specialist, OCLC, gave a thorough and in-depth presentation on advanced video cataloging essentials. This presentation provided experienced video catalogers with the opportunity to fine-tune and enhance their video cataloging knowledge and skills. Jay’s afternoon workshop on advanced video cataloging specifics was a continuation of one that he gave in the morning on basic video cataloging.

Jay began the Advanced Video Cataloging workshop by discussing the types of dates that can appear on video materials and the places where these dates can be found, such as in the beginning and ending part of a DVD, on the disc label of a DVD, on the container, and on accompanying material. These dates can represent different “bibliographic events,” including the original production, the release as a motion picture, the release in an earlier video format, the release on videodisc, and the copyright of design or accompanying material. According to him, dates are the most difficult elements of a bibliographic record to determine, because there are multiple places to look for dates on DVDs, and oftentimes these sources have differing dates. For the most part, monographs have title pages and the information on title pages is fairly standardized. Not so, for video recordings.

Jay begged those in the audience to remember—if nothing else—that a DVD from the United States cannot have a publication date earlier than 1997, or possibly 1996, if the DVD was made or manufactured in Japan.

The recording of dates in bibliographic records can frequently cause confusion, even for experienced video catalogers. Dates taken from the chief and preferred sources of information (title frames, ending credits, disc label) are generally the most important, but other factors or information on the DVD must be considered when recording date information. Dates for DVDs earlier than 1996 or 1997 cannot be considered publication dates. A later date from the container or accompanying material may be more important in a case such as this and could be used to infer a date of publication for a DVD. Video catalogers can account for other date-type information in
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other parts of the bibliographic record, such as 5XX (note) fields.

Relatively unadorned DVD releases of original motion pictures have a DtSt status of p in the fixed field. The publication date of the DVD release is coded in Date 1; the date of the original theatrical release is recorded in Date 2.

DVD releases with substantial new or extra material have a value of s in the DtSt fixed field. Date 1 reflects the publication date of the DVD and Date 2 is blank. Such substantially new or extra material might include: documentary material, such as “making of” videos, interviews, biographies, commentary tracks, etc.; or multiple versions or cuts that are included in the resource, such as the director’s cut, alternate endings, restored scenes, both wide-screen and pan-and-scan versions of the film, etc. Jay cautioned those in attendance to use judgment and care when determining what and how much new material qualifies as substantial. In either case, always include a note about the date of the original release of the DVD.

Jay discussed the differences between the 260 and 264 fields. Current RDA cataloging uses the 264 field, instead of the 260 field. Both fields are structured similarly, but there are some differences between the two. The major difference is that the 264 field has a second indicator that describes the function of the entity in the 264 field. Second indicator values are: 0 for production, 1 for publication, 2 for distribution, 3 for manufacture, and 4 for copyright notice date.

For coding language information in records for video materials, Jay encouraged audience members to consult CAPC’s Video language coding: best practices document, which was issued in 2012. This document provides illustrative examples and guidance on how catalogers should code language information in the fixed field, and the 041 and 546 fields. Coded language data in bibliographic records should support retrieval of the language of the main work(s) on the item, rather than the language(s) of supporting, supplemental, or bonus material. Additionally, this coded language data should be based on language(s) in which the item is usable, rather than all of the languages that might be found in the item.

The users, he reminded the attendees, are most interested in the spoken, sung, or signed language of the main content of a DVD or video recording; the written language of the main content of the item, including captions, subtitles, and intertitles; and the original language of the work. Bibliographic records should be coded to reflect these important aspects. Jay recommended that this type of data not be coded in our records: the language that appears on the packaging of a DVD (videodisc or videotape label or container); the language of the special features, including the audio commentary tracks or the spoken or written languages of the special features; the language of the credits; and the language of accompanying material, such as booklets or guidebooks.

Jay thoroughly discussed the 024, 028, and 037 fields and what type of information should be entered in these specific fields. Use the 024 field to record the Universal Product Code (UPC) and/or the International Article Number (EAN), if either appears on the item being cataloged. The 028 field is used to record a publisher’s number, if it exists on a DVD. There are no standards for the numbers recorded in the 028 field; they can be in any format and of any length. The 037 field records the source of acquisition and is now used only for recording numbers such as a distributor’s stock numbers.

As with his advice about the publication dates on DVDs, Jay reminded the catalogers in attendance that Blu-ray Discs cannot have a publication date earlier than 2006. Blu-ray technology was developed in February of 2002 and the first Blu-ray Disc titles were introduced commercially in June of 2006. When cataloging these materials, videorecording field 007 $e in bibliographic records should be coded with a value of s.

—Reported by Deborah Ryszka
University of Delaware

Michelle Hahn was the lucky winner of the “Little Teapot!”

Proceeds of the raffle were given to the OLAC Conference Scholarship fund and MOUG’s Ralph Papakhian Travel Grant fund.
VIDEO CATALOGING FOR THE NOVICE

Presented by Jay Weitz
OCLC

The focus of Jay Weitz’s presentation was a thorough introduction to cataloging videorecordings according to RDA. He began his presentation with a list of resources invaluable to the videorecording cataloger. These are the best practices document developed and made available by OLAC’s Cataloging Policy Committee (CAPC), the Audi-ovisual and non-print glossary, originally published in 1998 by Nancy Olson, and then later revised for an online edition, and the upcoming best practices for DVD/Blu Ray and Streaming Media according to RDA.

He continued with a brief side by side comparison of AACR2 and RDA and then focused on the change from the GMD to RDA’s carrier/content/media fields and statement of responsibility. The demise of the GMD has proved to be controversial. But the GMD has a checkered history as a media designator and is very one dimensional. With RDA’s content, carrier and media types, the assumption that the resource is first a book is no longer there. This is because all resources get these three fields. The statement of responsibility is not so straightforward. Moving images have various types of statements of responsibilities that are commonly distributed over at least three fields: 245, 508, 511. In RDA, the distinction between creator and contributor is unclear. Thankfully, the majority of videorecordings are entered under title since no one entity if responsible for the entire work. He also emphasized another difference from AACR2, namely the carrier details. Much of this information was recorded in 538 in AACR2. In RDA, this information is now separated into the 340, 344, 346, 347. He warned that the 345 is only for film and not video.

Jay finished by explaining what constitutes a silent soundtrack in RDA. If the video recording is of a silent film and has a musical soundtrack, then according to RDA (7.18.1.3), the content is not silent. However, the film is a silent film. In order to have sound content that is silent, there can be no sound.

He concluded by answering several questions. Minutes and seconds are still abbreviated. When measuring the duration of a recording or recordings on one DVD, the total duration goes in the fixed field and corresponds to the feature presentation. Even if there is no collective title, RDA still recommends that we express the total duration of each of the individual parts recorded in a 505 contents note. Finally, RDA does not prescribe any order to the notes. It is all cataloger’s judgment.

—Reported by Jennifer Eustis
University of Connecticut

12th Street Rag by Euday L. Bowman, c. 1919
Image courtesy of UMKC LaBudde Special Collections
WorldCat Discovery Now Includes Chat Widget, Additional Enhancements

A new feature in WorldCat Discovery Services (http://www.oclc.org/en-US/worldcat-discovery.html) enables library staff to embed a virtual reference chat widget within the discovery experience. Many member-requested enhancements have also been added, such as improvement to notes displays, customizable fulfillment messages, and more. New features added in late September 2014 include:

- Chat Widget: Now libraries who provide chat services, including virtual reference chat services such as OCLC QuestionPoint, can embed a “Chat with a librarian” link within the WorldCat Discovery environment. This way, users who are searching for materials can reach a librarian for assistance when needed.

- Member-requested enhancements: A number of additional enhancements have been added to WorldCat Discovery in response to OCLC member requests. These user-suggested enhancements include:
  - The action panel now has collapsible sections to provide a consistent user experience across devices and to support translations.
  - Item level notes are easier to read.
  - Permalinks are easier to find, create and share.
  - Libraries can customize the fulfillment messages shown by the integrated link resolver.
  - The description tab now also shows helpful information from the Dissertation Note (502 field, subfields $a, $b, $c, $g, $o) such as dissertation location, cast members, performers and more.

Features coming soon include support for Google Analytics. The WorldCat Discovery interface is available to all current FirstSearch, WorldCat Local, and WorldShare Management Services subscribers as part of existing, current subscriptions. Libraries are encouraged use the training and documentation resources available (http://www.oclc.org/support/services/discovery.en.html) and then start their transition to WorldCat Discovery today (http://registration.oclc.org/reg/?pc=worldcatdiscovery). WorldCat Discovery Services is an integrated suite of cloud-based applications that enables people to search WorldCat and also discover more than 1.5 billion electronic, digital, and physical resources in libraries around the world. It makes library collections visible to information seekers in the places where they start their search.

Four Centuries of Dutch Cultural Heritage Added to WorldCat

The National Library of the Netherlands, Koninklijke Bibliotheek (KB), has entered into an agreement with OCLC to add four important collections of digitized resources from Dutch-speaking countries to WorldCat for discovery of these valuable resources worldwide. The extensive and historically significant data comprise large numbers of digitized books, journals, newspapers, and parliamentary papers, aggregated from libraries across the Netherlands. The agreement is the latest development in a productive and long-standing partnership between OCLC and the National Library. The arrangement directs users searching WorldCat to more than 2 million pages from some 11,000 books published in the Dutch-speaking world from 1781–1800, 80 journals from 1840–1940, parliamentary papers from 1814–1995, and more than 6 million digitized newspaper pages. The content originates from the Netherlands, the Dutch East Indies, Suriname, the Netherlands Antilles, and the United States. WorldCat searchers can get to full-text content made available by the National Library through its Delpher service (http://www.delpher.nl/).
OCLC Research conducted an international linked data survey for implementers between 7 July and 15 August 2014 to learn details of specific projects or services that format metadata as linked data and/or make subsequent uses of it. This was an exploratory survey prompted by the OCLC Research Library Partners Metadata Managers Focus Group, who are excited by the potential of linked data applications to make new, valuable uses of existing metadata and wanted to learn from the experiences in the libraries/archives/museums community what is possible to do and how to go about it. The survey received 122 responses from users in 15 countries and included descriptions of 76 linked data projects or services. 25 of the described projects consume linked data; 4 publish linked data; 47 both consume and publish linked data. Key results from the survey include:

- The two main reasons why survey respondents implement linked data projects and services are to enhance their own data by consuming linked data from other sources and provide a richer experience for users.

- The four linked data resources that are consumed the most by respondents are id.loc.gov, DBpedia, GeoNames, and VIAF.

- The two main reasons why the linked data projects/services publish linked data are to expose their data to a larger audience on the Web and to demonstrate what could be done with their datasets as linked data.

- The four largest linked data datasets (with more than 1 billion triples) reported are WorldCat.org, WorldCat.org Works, Europeana, and The European Library.

Much of the advice offered by implementers centered around preparations and project management.

For more detailed explanations of the results, see OCLC Research Program Officer Karen Smith-Yoshimura’s Linked Data Survey Results series of HangingTogether blog posts (http://hangingtogether.org/):

- Linked Data Survey results 1: Who’s doing it (includes a list of survey respondents)
- Linked Data Survey results 2: Examples in production.
- Linked Data Survey results 3: Why and what institutions are consuming.
- Linked Data Survey results 4: Why and what institutions are publishing.
- Linked Data Survey results 5: Technical details.
- Linked Data Survey results 6: Advice from the implementers.

An Excel spreadsheet that contains a compilation of all survey responses (minus the contact information which OCLC promised respondents would be kept confidential) is available at oc.lc/0bglX7. See the OCLC Linked Data Research activity page (http://www.oclc.org/research/activities/linkeddata.html) for more information about OCLC’s work in this area.

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Shanghai Library Adds 2 Million Records to WorldCat

Shanghai Library, the largest public library in China and one of the largest libraries in the world, has contributed 2 million holdings to WorldCat, including some 770,000 unique bibliographic records, to share its collection worldwide. These records, which represent books and journals published between 1911 and 2013, were loaded in WorldCat earlier this year. The contribution from Shanghai Library, an OCLC member since 1996, enhances the richness and depth of Chinese materials in WorldCat as well as the discoverability of these collections around the world. The Shanghai Library was founded in 1952 and holds more than 53 million volumes, one of the richest collections of Chinese literature and historical documents. It merged with the Institute of Scientific and Technical Information of Shanghai in 1995 to become the first library in China to combine public library services with science, technology, and industry research functions.
Questions and Answers
Jay Weitz, OCLC

© We Transcribing, or © We Not?

Question: Under RDA, we are transcribing a title as it appears on the source of information (RDA 2.3.1.4). There is no specification about this type of symbol (trademark, registered, copyright, patent, etc.). Regarding symbols, RDA 1.7.5 indicates only the cases where the symbol cannot be reproduced as such.

Answer: According to RDA LC-PCC PS 1.7.5 regarding “Signs and Symbols” (LC practice/PCC practice, Point Number 4), one of the exceptions for substituting the word or phrase that is the equivalent of a sign or symbol is the following:

Exception 2: Ignore symbols indicating trademark (registered or otherwise), patent, etc. These include a superscript or subscript “R” enclosed in a circle (®) (ignore although included in the character set) and the superscript or subscript letters “TM” (™). Explain their presence in a note if considered important. Ignore such symbols also when they appear with elements used in access points.

This carries on the practice outlined under the corresponding section of AACR2 LCRI 1.0E, except that the LCRI stipulates “Do not explain their presence in a note.” The example included in both the LC-PCC PS and the LCRI is:

Preferred source
The Gumby® books of letters

Transcription
245 14 $a The Gumby® books of letters

If the symbol is either the entirety of the title (PS 1.7.5, Point 6) or a meaningful part of the title (such as “What ® really means in a digital world;” PS 1.7.5, Point 4), that would be a different story and you would need to substitute an appropriate word or phrase, as explained in those respective points in the LC-PCC PS.

Digital Present, Analog Past

Question: The disc I have is obviously digital, but the original recording was analog. The recording was made around 1998, so, I’m guessing that it was never issued as an analog recording, but the disc label does indicate that the original capture was analog. Other than in the 007 field, is there a preferred way to express this fact in the cataloging? I looked at the various 34X fields, but I don’t see a place for this information. In the old days, I’d add a 500 for “Compact disc; analog recording.” I guess I could just add a 500 for “Analog recording,” but if there’s a more contextual way to relay this info, I think that’d be preferable.

Answer: RDA 3.16.2.4 regards this information as one of the “Details of Type of Recording” and includes the example of what would amount to a 500 note, “Made from an analog original.” That sounds like a reasonable way to deal with it. If the resource itself includes a quotable statement about the original capture, that could be an even better 500 note. As I read it, “Made from an analog original” does not imply anything about a previous release as an analog recording, simply that analog technology was used for the original sound capture. But if the resource itself says that more clearly and/or with more detail, use a quoted note. And as you noted, code the Sound Recording 007/13 (subfield $n) as code “e” for “Analog Electrical Storage” or otherwise as appropriate for the original capture and storage technique.
Questions & Answers

Fitting Dates to a “t”

Question: Do we add the 264/4 subfield $c ©2014, $c ©2014 (or whatever dates apply) for all audio CDs? And in those cases, should we be coding DtSt (008/06) as “t”?

Answer: For audio recordings, the MLA Best Practices document recommends: “routinely record the latest phonogram copyright date in a separate 264 (2nd indicator 4) $c. If it has been deemed useful for identification or access to also record the latest regular copyright date, record both dates in a single 264 (2nd indicator 4) field, in separate occurrences of $c.” Continue to use the DtSt code hierarchy and if you have both a date of publication (in 264/1 subfield $c and a phonogram copyright date, you would code DtSt “t” when appropriate.

A Date with Uncertainty

Question: With RDA 1.9.2.5 offering the options for using “not before” and “not after” dates in the imprint area, what is the corresponding MARC coding in the DtSt fixed field (008/06)? Sorry if this has been put forth before and I missed it.

Answer: As I read MARC 21, these “not before” and “not after” dates would have to be coded as “s” for “Single Known Date/Probable Date” in 008/06 (DtSt). The MARC 21 definition of code “s” reads: “Date consists of one known single date of distribution, publication, release, production, execution, writing, or a probable date that can be represented by four digits. The single date associated with the item may be actual, approximate, or conjectural (e.g., if the single date is uncertain). Code s is also used for a single unpublished item such as an original or historical graphic when there is a single date associated with the execution of the item.” It’s the italicized sentence that makes me think “s” is the least objectionable choice, if not precisely correct.

To © Or Not To ©

Question: The compact disc I’m cataloging has copyright and phonogram symbols side by side next to the date. Are separate 264 fields entered for each symbol a la an example in OCLC Bibliographic Formats and Standards, or are both entered side by side in a 264 field?

Answer: First, remember that if a sound recording publisher has represented things accurately, only a phonogram copyright (℗) date can apply to the sound recording itself. A standard copyright date (©) associated with a sound recording can apply only to such elements as package design or accompanying text. With that in mind, RDA 2.11.1.3 states in part: “If the resource has multiple copyright dates that apply to various aspects (e.g., text, sound, graphics), record any that are considered important for identification or selection. … If the resource has multiple copyright dates that apply to a single aspect (e.g., text, sound, or graphics), record only the latest copyright date.” LC-PCC PS 2.11 states: “LC practice for Core Element: Record a copyright date for a single-part monograph if neither the date of publication nor the date of distribution is identified. It is not required to record copyright dates for multipart monographs, serials, and integrating resources.” So, if you have neither a date of publication nor a date of distribution for a monographic audio recording, you must include the ℗ phonogram copyright date if you have one. If you do have a date of publication, it would be prudent to follow the Music Library Association’s “Best Practices for Music Cataloging Using RDA and MARC21” (http://www.rdatoolkit.org/musicbestpractices), which recommends: “For audio recordings, routinely record the latest phonogram copyright date in a separate 264 (2nd indicator 4) $c. If it has been deemed useful for identification or access to also record the latest regular copyright date, record both dates in a single 264 (2nd indicator 4) field, in separate occurrences of $c.” Note that whenever you have field 264 with the Second Indicator value 4, there will be no subfields $a or $b in the field.
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