



SHARE Bibliographic & Cataloging Standards Committee Minutes

Friday, October 14, 2022

10:00 a.m.

Call Meeting to Order

The meeting was called to order at 10:00 a.m. by Donna Schaal.

Roll Call

Members present: *Gwen Bumpers, Lauren Erwin, Jacob Pahde, Donna Schaal, and Carol Ziese at 10:01 a.m.*

Members absent: *Emily Drone and Jane Zerkel*

Others present: *Jennifer Baugh, Barbara Bennet from Carbondale Public Library, Jace Cook, Mary Cornell, Linda Johnson, Connie Kisner from Carmi Public Library, Gayle Lane from Carmi Public Library, Megan Lopez from Allerton Public Library District, Shawwna Maki from O'Fallon Public Library, Eric McKinney, Donald Pippin, Cassandra Thompson, and Anna Wiegand.*

Approval of July 15, 2022, Minutes

A motion and second were made to approve the July 15, 2022, minutes. Motion carried unanimously by roll call vote.

SHARE Update

Ben-Gil Elementary has gone live on Polaris and is our newest full member.

The McNaughton Book Leasing Program is available and after discussion with a Brodart representative, we have found a way to let member libraries select the books they receive. Large print books will also be available, as well as a new program with large print trade paperbacks. Existing members can begin this selection process in January. For those interested in joining, in January, prorated contracts for a 6-month period will be available. More information is available on the SHARE website.

Biblio+ is available and the SHARE Director can provide more information upon request.

The SHARE Finance and Policy Committee is working on expanding the affiliate program. The program would allow standalone libraries to utilize the Polaris database for interlibrary loan, with school libraries in mind as they often have issues with school boards approving funding to join SHARE. The program will be discussed more at the next committee meeting.

The Aspen Discovery layer has made its way through the other SHARE committees. A solution has been found to address concerns over affordability. SHARE will offer Aspen to members at a rate of \$2,500.00 for the first 25 member libraries that opt in. These members would receive a fully customizable Aspen Discovery layer that would allow them to integrate their various e-resources and databases with the OPAC. Every other member would then be offered the base package for \$250.00. If more members sign up for the discovery layer, the prices will decrease. Interest will be gauged at IHLS Member Day via a

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demo for our member libraries. This is not a guarantee that we will be offering the discovery layer, but it will be useful to allow our members to get a better understanding of the project and for SHARE to decide if the project is financially viable. Vega, one of the alternatives to Aspen, was much more expensive when compared to Aspen and the features in Vega were limited. The scope of Aspen's capabilities has expanded, which makes it the best option for the price currently. EBSCO also has discovery layers, but they tend to not have consortial products. ByWater Solutions will also have a booth at this year's Illinois Library Association (ILA) Annual Conference for those attending to learn more.

There have been issues with account text alerts for AT&T customers. A temporary solution has been found and will be implemented, but a more permanent solution is in the works.

SHARE and IHLS are asking members to delay upgrades to Windows 11 due to problems with our remote access software. A solution is in the works and once that is complete, members will be able to upgrade.

The SHARE Mobile Library App content notes have been resolved and are now visible in the app. Some members expressed interest in the ability to filter items on the app to show only items available at a patron's home library. Others have also expressed interest in being able to see hold dates and delayed hold dates in the app. Both topics would need to be addressed by Polaris.

The SHARE Annual Member's Group Meeting will be held virtually on January 12, 2023, at 2 p.m.

New Business

- **Material Types** – In the system, there are 91 material types, some of which do not have many items attached. Some of the material types are redundant or too specific; for example, there is a material type for 3D DVDs, which could be categorized as DVDs instead. There has been discussion on whether 91 different types are needed or if the number of types could be reduced to remove clutter in the system. A threshold could be set to determine the minimum number of items attached to a material type for it to be kept as a type in the system. Material types control the circulation role/period of items and are set at the system level. Libraries could utilize an authority code to combine similar types, and these codes are set at the branch level. Having 91 material types does not slow down the system, and some special libraries may need the material types because they have very specific items that are defined by those types, which would be hindered by a threshold being set. If some of the material types are eliminated, there would need to be a miscellaneous material type to account for those specific items in special libraries. SHARE staff will analyze the material types with the least amount of items and reach out to the libraries using those material types to see how they use them and if they could recategorize those items to different material types or if those libraries feel they are necessary.
- **Addition of Different Thesauri** – A SHARE cataloger has been cataloging LGBTQIA+ books and is having a hard time finding appropriate vocabulary during this process. Homosaurus could be added as an authorized vocabulary for subject headings to provide proper terminology.

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Currently, the guidelines recommend using LCSH, LCGFT, GSAFD, OLACVGGT to name a few. It is better practice to have recommendations for thesauri than to let catalogers find random options. One committee member recalled another thesaurus that was specific to board games that might be useful to add to the recommendation list. The committee will find other needed thesauri for consideration in the future. **A motion and second were made to add Homosaurus and Getty AAT to the guideline thesauri for cataloging. Motion carried unanimously by roll call vote.**

- **Policies and Procedures – SHARE Definitions** – The SHARE definitions are currently being reviewed due to updates in ILLINET code and to standardize the language used in policies and procedures. Inconsistencies are present in said policies and procedures due to their creation dates being either before or after the changes to ILLINET code. The document is a work in progress, but SHARE committees are being shown the document for comment and to ensure everyone approves of the updates. If there are any corrections or changes that need to be made, the SHARE Director can be contacted. The definition of reciprocal borrowing was discussed, and it was explained that many of the definitions are dependent on definitions provided by the Illinois State Library (ISL). The guide will be alphabetized when finalized.
- **What qualifies for CE Hours?** – Recently, a Continuing Education (CE) Request was received by the SHARE Bibliographic Services Manager that was for a book focused on cataloging. Discussion was held on how to assign hours to the book, given the book is appropriate for CE requirements. The committee would prefer that the SHARE Bibliographic Services Manager determine eligibility of books and to assign the number of hours the book would qualify for given the content. A guideline will be shared on the website to inform members that books are acknowledged for CE credit but need to be pre-approved to qualify.
- **Other** – None

Old Business

- **Barcoding Refresher Training** – The SHARE Bibliographic Services Manager presented her progress on the Barcoding Refresher Training. The course shell was shown, and it was explained that the course would be maintained in terms of cataloging standards, key topics, and video tutorials. After each section of the course, there will be quizzes to ensure the training is being utilized and not just passively playing. The training will also serve as a reference point for barcoders in the event they have questions or do not remember a topic clearly. Templates will be added as a training section. Additionally, training snippets will be created to showcase the most common topics, problems, and violations such as attaching items to the wrong bibliographic record or to item records for quick reference. The training's completion will be in January in time for the SHARE Annual Member's Group Meeting. It will go out for member vote in January with a hopeful launch of February 2023. Members will have until December 31, 2023, to complete the training. Failure to do so will result in barcoding permissions being revoked until training is completed. After the initial training, reminders will be sent when the barcoder is due for the

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training again every 2 years. The SHARE Bibliographic Services Manager will reserve the right to make a cataloger take the training if they have repeated violations. Communication to member libraries will emphasize that this training is not for catalogers, it is only for barcoders.

Changes to policies regarding the barcoding refresher training were made and updates on the problem resolution process were sent to the committee in three documents prior to the meeting. CE hour reminders will be sent out on a slightly different schedule to remind members of the remaining hours they have each year. Provisional records, duplicate records, and on-the-fly records were discussed for clarity, as they are part of the problem resolutions documents. After discussion, the word “provisional” will be removed from the Problem Resolution for Bibliographic Services document and replaced with “duplicate” for clarity. **A motion and second were made to approve the Problem Resolution for Bibliographic Services documents with the agreed upon changes, to send the documents to the SHARE Executive Council for approval, and then on to member vote. Motion carried unanimously by roll call vote.**

A motion and second were made to approve the SHARE Policy Proposal – Certification Requirement and Bibliographic Services Training Form. Motion carried unanimously by roll call vote.

- **Author vs. Adapter as main entry in records for manga graphic novels** – The committee was presented with the best practices from the Graphic Novels and Comics Round Table (GNCRT) of the American Library Association (ALA), per discussion in the last committee meeting. From the GNCRT, it is recommended for the main entry in a graphic novel or manga to choose the agent, person, family, or corporate body with personal responsibility as the main entry, which in most cases will be the writer or artist. For adaptations such as graphic novelizations of literature, they recommend using the first listed adapter as the main entry, usually the adapter or artists. The original author is then entered as a 700-field entry. This practice goes against current SHARE policy, which states that when a translated work has been adapted to enter the work under the person responsible for the adaptation and make an added entry for the author. The current practice causes confusion when adapters change from volume to volume in a series, as it appears the author has changed. To minimize confusion, the policy will apply to manga and graphic novels as well as graphic novelizations of literature so patrons can easily find materials and state that the default author should be the creator of the original work rather than any adapters. Any previous records that follow the old policy would be cleaned up as time allows. **A motion and second were made to change the language of the SHARE manga and graphic novel policy to reflect that the best practice is to list the original author in the 100 field and place adapters in the 700 field, to send the changes out for cataloging comment, and then to send out the policy for member vote. Motion carried unanimously by roll call vote.**
- **Library Implementation & Barcoding Levels** – An expansion to the affiliate membership program is being considered, and with that there are concerns over whether or not SHARE should offer transitional members of this program barcoding. A school that is interested in the

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program has had some concerns over transitioning their barcoding to be compatible with SHARE. Discussion was held on a barcoding level “C” that would allow those transitioning members to receive barcoding services for a fee and to allow for barcoding training sessions. Given the amount of work this would take, SHARE might have to hire an additional staff member or a contract cataloger to accommodate the increased workload. Processing of the books would still be done by the vendor, but the barcoding would be handled by SHARE. Additional materials would have to be purchased such as labels, stamps, and tape. Pricing is still being considered and will be discussed in the SHARE Finance and Policy Committee, but the preliminary numbers indicate a potential rate of \$4,000.00 for 2,500 books. This added barcoding level could increase access to other libraries that are hesitant about the process, while still ensuring the transitional members are paying their fair share. A potential solution to decrease the strain on SHARE staff would be to allow “barcoding buddies” in which existing SHARE catalogers could participate in the barcoding and would receive discounted membership fees for their library as a result. Feedback was positive from the committee and a formal proposal will be drafted by the SHARE Director and brought back to the committee after financial information is added through the SHARE Finance and Policy Committee.

- **Other** – The SHARE Circulation and Resource Sharing Committee discussed international DVDs again and concluded that the DVDs should be allowed to circulate but need to be clearly marked in the bibliographic and item records that there may be compatibility issues. The SHARE Bibliographic Services Manager will remind catalogers to add a note field on any such DVDs. This reminder will inform catalogers that the 250 field would be preferred for this, as the 300 fields, and specifically the 346 field, do not display for patrons. The 520 field for content advice could also work. Policy language will be updated to reflect this as well and that update will be sent to the committee for the next meeting.

Public Comment – OCLC has sued Clarivate and its subsidiaries over the use of OCLC metadata. The International Coalition of Library Consortia (ICOLC) has put out a statement expressing that metadata should be open access and that no one company should have control over it. SHARE has discussed internally whether or not to support ICOLC’s statement but has not formally moved forward in that support.

Announcements

None

Next meeting

Friday, January 20, 2023, at 10:00 a.m.

Adjournment

There being no further business to discuss, the chair adjourned the meeting at 12:04 p.m.

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