

2006 CONSER Annual Report Nov. 14, 2006

Highlights

Fiscal year 2005-2006 was eventful for many reasons, including the series policy change announced by Library of Congress in April and the combining of OCLC and RLG in June.

The year was notable also for many new and continuing CONSER activities. Throughout the year the Access Level Record for Serials Task Group, led by Regina Reynolds (NSDP) and Diane Boehr (NLM) developed recommendations for a new standard record for CONSER. Trainers associated with the Serials Cooperative Cataloging Training Program (SCCTP) experimented with working in two distance learning formats, the "live-online" environment and an asynchronous learning format. Members of the Publication Patterns Initiative continued to encourage adherence to the MARC 21 Format for Holdings and encouraged vendor participation in piloting new formats of *ONIX for Serials*. Member libraries of the University of California system worked together to develop a new membership model that includes several UC libraries new to CONSER working at the enhance level. A short term CONSER enhance project developed by San Diego State University was among the first new enhance projects developed since membership categories were changed several years ago. Two issues of the *CONSERline* newsletter were issued during the fiscal year.

Les Hawkins continued as CONSER coordinator, Hien Nguyen continued as CONSER Specialist. Statistics reported through the PCC statistics page <<http://www.loc.gov/catdir/pcc/stats/>> indicate an 8% increase in newly authenticated records and an 18% increase in maintenance transactions. Some of this increase is attributable to the addition of new members and the activities of new enhance projects.

CONSER Standard Record for Serials

The pilot of the Access Level Record for Serials (later in the year known as the CONSER Standard Record) began in February, five months after co-chairs Regina Reynolds (LC) and Diane Boehr (NLM) held the first meeting with its working group members. The Access Level Record for Serials Working Group was formed to develop a single CONSER standard record that would apply to all formats (print and online), replace existing multiple record levels, and reduce serials cataloging costs by requiring only those elements that are necessary to meet FRBR user tasks

The group tested a record element set and cataloging guidelines via pilot projects at 13 U.S. libraries. Pilot study volunteers included teams made up of cataloging, reference, and acquisitions staff from the participating libraries. An Access Level Record Review Survey was designed by Peter McCracken (Serials Solutions) to collect input from reference and public service staff on any impact the access level records might have on the end user's ability to find, identify, select, and obtain access to the resource.

The final report and recommendations <<http://www.loc.gov/acq/conser/alrFinalReport.html>> of the working group were released in July 2006. CONSER members were provided comments up to October 1, 2006. The PCC Policy Committee approved the implementation of the CONSER standard record at its November 2006 meeting.

A related group also lead by Reynolds and Boehr began working on recommendations for authentication codes and encoding levels in Sept. 2006. The work of this group will facilitate implementation of the access level record and also provide an appropriate authentication code for integrating resources by BIBCO and CONSER members. The final report from this group is available from <http://www.loc.gov/acq/conser/authcodes_finalreport.pdf>.

SCCTP and CLW

Last fall, the SCCTP Integrating Resources Cataloging Workshop was converted for online asynchronous learning by the workshop's original creator, Steven J. Miller, University of Wisconsin-Milwaukee Libraries and School of Information Studies and with content redesigned and supplemented by Lisa Furubotten, Texas A&M University.

In February, four SCCTP trainers attended the online course "Teaching Courses in a Live Online Environment" taught by Christine Peterson, Continuing Education Librarian of Amigos Library Services. This training was aimed at teaching SCCTP trainers to repackage existing SCCTP materials and familiarize them with teaching in an online format. In September 2006, a grant from NASIG made it possible for 7 additional PCC trainers to take part in the "Teaching Courses in a Live Online Environment."

The workshops of SCCTP and the workshops jointly developed by the PCC, LC, and ALCTS are offered under the auspices of Catalogers Learning Workshop (CLW). Hien Nguyen and Les Hawkins participated in meetings and activities of the CLW Editorial Team with colleagues from the Cooperative Cataloging Team, CDS, CPSO, IDTD, and representatives from ALCTS and PCC institutions. The CLW Editorial Team developed standards for designing, delivering, and updating the workshops offered through CLW. The group also worked to assure that there is an infra structure for maintaining, promoting and developing workshops. CLW Editorial Team members participated in a seminar on distance learning modes presented by several LC staff involved with distance learning.

Publication Patterns Initiative

Member contributed publication patterns and modifications to records increased by 57% over the fiscal year.

The Publication Patterns Initiative met at ALA mid-winter and received an update on the ONIX for Serials formats from Linda Miller (LC). Linda described several pilot projects that are taking place involving vendors and publishers. Meeting participants emphasized the importance of increasing the involvement of publishers in ONIX for Serials tests and concluded that the timing is right to form a publisher advisory group for the Initiative.

Linda Miller and Katharina Klemperer published an article in *Serials Review*, "What is ONIX for Serials? What Potential Does it Have For the Serials Workflow?," vol 32, no 1 (Mar. 2006). The article emphasizes that publishers, "middle" agents, and librarians can make many gains by piloting and adopting the ONIX for serials formats as soon as they appear in final forms.

LC Series Decision

LC's series decision was a major topic of the CONSER Operations Meeting and the CONSER ALA At-Large Meeting in June. Operations representatives resolved to ask the PCC Policy Committee to put into place a process to simplify series authority practices and identify series control work that provides the most benefit to libraries and users. During the At-large meeting at ALA, attendees considered ideas for simplifying practices including a suggestion to use 8XX fields in lieu of the 440 field. Attendees affirmed that a PCC group should be set up to:

- 1) resolve PCC program differences in series practices
- 2) examine existing user studies or explore ideas for commissioning studies on use of series access points in bibliographic records
- 3) make recommendations for PCC series practice simplification and

documentation, including identification of categories of series that most benefit from authority control.

LCSH Enhance Project

Julie Su of San Diego State University designed an enhance project to add LCSH to records in the CONSER file that have only MeSH. These titles are part of the Serials Solutions record set and the project is limited to 600 records. The project is one of the first new enhance type of projects CONSER has implemented since membership categories were revised several years ago. Julie reported on the project at the CONSER At-Large meeting in June.

Task Groups

The CONSER Ad-Hoc RDA Comment Group continued to review drafts of *Resource Description and Access (RDA)* throughout the fiscal year. Comments on Part 1 and Chapters 6-7 were submitted to CC:DA as a constituent response. The group is chaired by Kristin Lindlan (University of Washington).

The Task Group to Plan for Multiple 260 Fields worked throughout the year to develop guidelines for repeatable 260.

The Task Force on Coverage of E-serials provided input on a sample of CONSER records derived from the OCLC E-holdings Project. CONSER members discussed the logistics of adding several thousand bibliographic records generated through the E-holdings Project to the CONSER file throughout the fiscal year.

A CONSER group formed in 2005 to determine appropriate record elements for authenticated serial records contributed to the DLF Registry of Digital Masters worked on several different models for record contribution in 2006. The group has opened a dialogue with DLF members responsible for issuing guidelines for the registry.

Integrating Resources

In April 2006, a group of LC staff and a representative from OCLC was convened to develop a plan for LC authentication of integrating resources. A plan is now in place and ready for implementation when other tasks related to distributing integrating resource records are completed. Also during the spring of 2006 an ad-hoc group of PCC members, OCLC representatives, and LC staff worked to identify the timeline and tasks that need to be completed by LC, CDS, PCC members, and OCLC to allow for authentication and distribution of records for integrating resources. When completed, the workflow will allow both CONSER and BIBCO members using OCLC to contribute and update records for integrating resources and distribute them to CDS database subscribers.

UC Funnel

Staff at several University of California (UC) campuses developed a CONSER bibliographic funnel. Assisted by UCLA (CONSER Full Level member since 1980) and UCSD (CONSER Associate member since 1996) the UC CONSER Funnel offers interested UC campuses several levels of participation. A basic organizational structure has been established with a steering committee, a campus liaison for each participating campus, and a training plan. UC Berkeley, UC Davis, and UC Irvine are participating in the first phase of the Funnel with others to join in the next phase. Training, mentoring, and a review process to certify new catalogers is being arranged by SCCTP trainers and catalogers in the UC system. Pat French, formerly at UC Davis deserves special recognition for initiating the proposal. Thanks also to Valerie Bross (UCLA), Melissa Beck (UCLA) and Adolfo Tarango (UCSD) for taking the leadership role in guiding this group.

Other Membership News

Serials Solutions is the newest affiliate level CONSER member. It has been several years now since we've had a new member in this category. In applying for CONSER membership, Peter McCracken, Director of Electronic Content Management at Serials Solutions mentioned his eagerness to contribute to the greater good of the library community through error detection techniques used to process the CONSER file (distributed by the Library of Congress Cataloging Distribution Service as the MDS-serials subscription product). In linking bibliographic records with metadata from electronic resource vendors, Serials Solutions has been able to detect record control number errors in linking fields and identify other issues that require attention in CONSER records. In the past, Peter has reported these errors to the CONSER office for correction; now as a CONSER member Serials Solutions can make corrections directly in OCLC.

The training plan for Serials Solutions involves three phases, beginning with corrections to record control numbers in linking fields and progressing to work that requires more verification and cataloging experience. John Levy (LC) has begun working with Serials Solutions catalogers, Amanda Louie and Kara Hyde, for the first phase of training. Amanda and Kara also attended the CONSER operations meeting held April 27th and 28th, 2006 at the Library of Congress.

A later phase of training will include adding other enhancements to CONSER records. As a subscriber to the ISSN Portal, Serials Solutions is in a good position to transcribe ISSN data for non-US/non-Canada serials on appropriate CONSER records. The US and Canadian ISSN centers both contribute records directly to the CONSER file, so being able to verify ISSN data for records that are not covered by these two centers will be a valuable enhancement. Staff in NSDP, the US ISSN Center, will handle training for this phase.

Other new members included Saint Louis University Pius XII Memorial Library and Serials Solutions. Connecticut State Library and New York University Law Library were declared independent Associate level members during 2006.

CONSER Documentation

Update 16 of the CONSER Editing Guide (CEG) was completed in the fall of 2005 and distributed in 2006. After update 17 is completed in fall 2006, the CEG will move to a standing order model for distribution. Most of the work on update 3 of the CONSER Cataloging Manual (CCM) was completed in the fiscal year, this update should be distributed in the fall 2006. This was the last update of the CCM to be issued through subscription from CDS. In the future, the CCM, the CEG, and their updates will be available by standing order in print format and available online in pdf format from CDS.

CONSER Member Reports

<http://www.loc.gov/acq/conser/Members2006.pdf>

Statistics

Program for Cooperative Cataloging Statistics:

<http://www.loc.gov/catdir/pcc/stats/totals06.pdf>

Publication Patterns statistics: <http://www.loc.gov/acq/conser/ppi/ppp2006-total.pdf>

APPENDIX A

MEMBERS OF CONSER COMMITTEES (2005-2006)

CONSER Operations Committee

Institution	Representative
American Theological Library Assoc.	Judy Knop
Brown University	Gretchen Yealy
Center for Research Libraries	Stephen Early
Cleveland Public Library	Andrea Olson
Columbia University	Charlene Chou
Connecticut State Library	Glynis M. Georgie
Cooperative Computer Services	Roger Anderson
Cornell University	Cecilia Sercan
Harvard University	Ruth Haas
Health Sciences Library System	Malgorzata (Gosia) Fort, Ph.D
University of Pittsburgh	
Hong Kong Univ. of Sci. and Tech. Library	Ada Shuk-man Cheung
Indiana University	James Castrataro
Library of Congress	Les Hawkins, Chair
Massachusetts Institute of Technology	Bonnie Parks
Michigan State University	Wen-Ying Lu
National Agricultural Library	Tina Shrader
National Library of Canada	John Clark
National Library of Medicine	Miranda Hay
National Library of Wales	Galen Jones
National University	Ed Jones
New York Public Library	Edith Gewertz
New York State Library	Miriam Bogen
New York University	Everett Allgood
New York University Law Library	George Prager
Northwestern University	Kevin Randall
OCLC	Robert Bremer
Oregon State University	Vacant
St. Louis University Law Library	Margaret Smith
Saint Louis University, Pius XII Memorial Library	Vacant

State University of New York at Buffalo, Health Science Library	Cindy Hepfer
Texas A&M University	Lisa Furubotten
Tulane University	Peter Fletcher
U.S. Government Printing Office	Jennifer K. Davis
University of California, Los Angeles	Valerie Bross
University of California, San Diego	Adolfo R. Tarango
University of Chicago	E. Renette Davis
University of Cincinnati, Medical Center Libraries	Mary Piper
University of Florida	Naomi Young
University of Georgia	Beth Thornton
University of Maryland, College Park	Jeanne Baker
University of Michigan	Leighann Ayers
University of North Carolina at Chapel Hill	Frieda Rosenberg
University of Oregon	Mary Greci
University of Texas at Austin	Sue Fuller
University of Washington	Kristin Lindlan
Vanderbilt University	Ann Ercelawn

Affiliate Members

Institution	Representative
Chemical Abstracts Service	Edward Gyetvai, Jr.
EBSCO Information Services	Melanie Watts
CSA (Cambridge Scientific Abstracts) (formerly R.R. Bowker)	Alayne L. Mundt
Serials Solutions	Peter McCracken

APPENDIX B

CONSER TASK FORCES/GROUPS

<p>Task Force on Publication Patterns and Holdings</p> <p>Carlen Ruschoff (Maryland), chair John Attig (Penn State) John Espley (VTLS) Ed Glazier (RLG) Rich Greene (OCLC) Rebecca Guenther (LC) Ruth Haas (Harvard) Katherine Harnish (Endeavor) Diane Hillmann (Cornell) Martha Hruska (U. of Florida) Ed Jones (National University) Linda Miller (LC) Jennifer O'Connell (EBSCO) Frieda Rosenberg (UNC, Chapel Hill) Les Hawkins, ex officio</p>	<p>CONSER Standard Record (formerly: Access Level Record) for Serials Pilot Project</p> <p>Co-chairs: Regina R. Reynolds, Diane L. Boehr (NLM) Bill Anderson (Serial Record Division, LC) Melissa Beck (UCLA) Edith Gewertz (New York Public) Carolyn Larson (Science, Technology and Business Division, LC) Kristin Lindlan (University of Washington) Peter McCracken (Serials Solutions) Vanessa Mitchell (CSA) Hien Nguyen (CONSER ex officio) Tina Shrader (National Agriculture Library) Steve Shadle (University of Washington) Diana Snigorowitz (Serial Record Division, LC)</p>
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<p><i>Task Group to Plan for Multiple 260 Fields</i></p> <p>Ed Glazier (RLG) Robert Bremer (OCLC) Regina Reynolds (NSDP/ISSN Network) Cindy Hepfer (U. Buffalo, Electronic Periodicals Management Department, Acquisitions) Judy Kuhagan (CPSO) Jane Gillis (Yale, interest from rare serials cataloging viewpoint) Les Hawkins (Co-chair CONSER Coordinator) Carolyn Sturtevant (Co-chair BIBCO Coordinator) CONSER Task Force on Coverage of e-serials</p> <p>James Castrataro (Indiana) Charlene Chou (Columbia) Jennifer O'Connell (EBSCO) Steve Shadle (U. of Washington) Co-chair Adolfo R. Tarango (U. of Calif. San Diego) Co-chair Naomi Young (U. of Florida)</p>	<p>CONSER Ad-Hoc RDA Comment Group</p> <p>Everett Allgood NYU Valerie Bross UCLA Renette Davis University of Chicago Carroll Davis LC Sue Fuller University of Texas Libraries Lisa Furubotten Texas A&M Les Hawkins LC Jim Holmes University of Texas Libraries Ed Jones National University Library Judith Kuhagen LC (CPSO Liaison) Kristin Lindlan University of Washington (Chair) Jeffrey Myers-Hayer LC Hien Nguyen LC Kevin M. Randall Northwestern Regina Reynolds NSDP Tina Shrader NAL Naomi Young University of Florida</p>
<p>CONSER URI Task Group</p> <p>Valerie Bross (Chair) (UCLA) Ardie Bausenbach (LC) James Castrataro (Indiana U.) Becky Culbertson (UCSD) Renette Davis (U. of Chicago) Rick Fitzgerald (LC) Les Hawkins (CONSER Coordinator) Ed Pentz (as CrossRef representative or resource) Regina Reynolds (NSDP) Steve Shadle</p>	<p>CONSER Ad-hoc Task Group Making Recommendations for the Registry of Digital Masters</p> <p>Diane L. Boehr (NLM) Robert Bremer (OCLC) Renette Davis (U. Chicago) Lisa Furubotten Texas A&M Les Hawkins (LC) Dave Reser (LC) Steve Shadle (U. of Washington) Naomi Young University of Florida</p>

<p>Task Group on FRBR and Continuing Resources</p> <p>Everett Allgood (NYU), co-chair Ed Jones, co-chair John Attig (Penn State University) Robert Bremer (OCLC) Valerie Bross (UCLA) E. Ann Caldwell (Brown) Carroll Nelson Davis (LC) Ann Sitkin (Harvard Law) Naomi Young (U.Fla) Les Hawkins, ex officio (LC)</p>	<p>CONSER Task Group non-AACR2 records</p> <p>Everett Allgood (NYU) Robert Bremer (OCLC) Lucy Barron (LC) James Castrataro (Indiana) Steve Early (CRL) Mary Greci (Chair) (U. of Oregon) Lisa Furubotten (Texas A&M) Hien Nguyen (LC CONSER Specialist) Bonnie Parks (Oregon State University) Margaret Smith (Saint Louis University, Law Library)</p>
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