

**POLICY AND STANDARDS DIVISION**

**ANNUAL REPORT**

FY 2010

(October 1, 2009 - September 30, 2010)

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Barbara B. Tillett, Chief, PSD

# PSD ANNUAL REPORT, FY 2010

## PSD Mission

The Policy and Standards Division's mission is to provide leadership in the creation and implementation of cataloging policy and standards within the Library of Congress and in the national and international library community; to support the effectiveness of the cataloging staff at the Library of Congress through guidance, advice on cataloging policy, documentation, and maintenance of bibliographic, authority, and classification records; and to develop and support national and international standards for structure and content of bibliographic, authority, holdings, item, and classification records through cooperative endeavors.

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## THE YEAR'S HIGHLIGHTS

### **Responsive to long-standing requests to provide more modern terminology**

**Cookery.** In the largest project ever undertaken to change specific vocabulary in LCSH, we completed this year the change of "Cookery" headings to "Cooking," and introduced the term "Cookbooks." The project was led by Libby Dechman. Hundreds of authorized headings were involved; the Weekly Subjects List that was devoted to the bulk of the headings contained 788 proposals, the largest list ever. The associated bibliographic records numbered over 100,000, of which over 40,000 were revised (the heading changes only) by year's end. Of the remaining 50,000 to 60,000, each will have a 655 field containing the term "Cookbooks" added, manually, record by record. The prospect of this change was welcomed by librarians outside LC when we announced that we were considering it, and the 98 comments received during the comment period subsequent to our posting of the project proposal were useful in helping us decide among alternatives for particular changes some of the related headings required.

The change of the Cookery subject headings, beyond being the largest single project to modernize the language of LCSH, also allowed us to authorize the use and to apply the genre/form heading Cookbooks. It is exciting to have such a high-profile example of the value of Genre/Form headings. The application of this particular heading offers an opportunity for an intimate glimpse into the cultural record, for what could be more intimate than knowing what people eat? And after all, creating the cultural record is the Mission (with a capital "M") of the Library.

**Genre/Form expansion – cartography, law, music, religion.** The genre/form initiative, which officially began at the Library in 2007, is coordinated by Janis L. Young. The first terminologies created were for moving images and spoken-word sound recordings. Those projects are now out of the active development stage and are being maintained. By the end of this fiscal year terminologies in four additional disciplines, cartography, law, music and religion, were being actively developed, and the planning for another, the literature project, was under way.

LCSH is being used as the primary resource when developing new genre/form terms, but other thesauri are also consulted for terminology that does not appear in LCSH. For now, LC and SACO catalogers will submit LCSH proposals instead of genre/form proposals in cases where the genre/form terminology for the discipline has not yet been through the regular Weekly List review process (e.g., music). Those headings are also being considered for inclusion in the genre/form thesaurus.

Genre/form activities include working closely with colleagues from throughout the Library (e.g., the Music Division, the Folklife Center, and the ASME Hebraica Section) as well as with organizations outside of the Library, including the American Association of Law Libraries, the American Theological Library Association, and the Music Library Association. PSD also is collaborating with the Genre/Form Implementation Subcommittee of the Subject Analysis Committee (SAC) of ALCTS.

This year PSD announced that the genre/form thesaurus will be formally separated from LCSH in both MARC records and printed products; the thesaurus is now

titled *Library of Congress Genre/Form Terms for Library and Archival Materials* (LCGFT).

### Exploring social cataloging

**LCSH/SKOS expansion.** The leaders of this project in PSD are subject policy specialist Libby Dechman and Loche McLean from the Product Services Section. By the end of the year, our Authorities and Vocabularies Web site contained the *Library of Congress Subject Headings* and the *Thesaurus for Graphic Materials*, along with several other lists of controlled terms used for MARC 21 and Preservation terms controlled by the Network Development and MARC Standards Office.

The social cataloging aspect is a feature of “id.loc.gov”, LC’s “Authorities & Vocabularies Service,” a Web service for registered, controlled vocabularies in SKOS format (Simple Knowledge Organization Schema). People can submit comments, suggestions, corrections, etc., to the data found in the registered vocabularies. During this fiscal year, we implemented the “Terminology Suggestion” feature, from which we have received 16 suggestions for updated or new terminology. It is difficult to determine how many users have downloaded the entire vocabulary or developed applications based on the Authorities & Vocabularies Service (id.loc.gov). However, we are informed every day about new applications developed using LCSH/SKOS data, including:

- HIVE project (Metadata Research Center, University of North Carolina); automatic application of LCSH terminology to bibliographic information
- Library of Congress Subject Headings (ZVON.org); robust LCSH searching geared toward human users
- EUROVOC (EU); supporting a developing, interoperable union list of vocabularies in the EU
- National Diet Library (Japan); using both LCSH in English and Japanese headings
- STW Web Services (German National Library of Economics); using economics headings from LCSH applied to bibliographic information
- TELplus WP3.1 (The European Library); full-text search engine prototype using LCSH subject heading vocabulary
- Browsing LCSH ([Universitätsbibliothek Braunschweig](http://www.uni-braunschweig.de)); browser
- LC Subjects.org; provides a mirror site to id.loc.gov and allows institutions to create their own URIs and do experiments with LCSH data.

We (LC) are experimenting with mounting versions of portions of **LCSH in multiple languages**; this is in addition to the snapshot of RAMEAU (BnF) that is already linked to LCSH. Participating institutions: Université Laval, Canada for their French-Canadian subject heading system, *Répertoire des vedettes- matière*, based on LCSH; National Library of Chile and National Library of Spain for their respective Spanish subsets of LCSH. Also, we have recently received an expression of interest in the project from the Bibliotheca Alexandrina for Arabic. We have provided feedback about test results. We explored whether and how best to incorporate this data into SKOS and to have linking data that would enable users to match terms across languages.

## **Transforming descriptive cataloging**

**LCRI review, creation of LCPS.** In conjunction with the development of a new cataloging code, *RDA: Resource Description and Access*, descriptive policy specialists, under the leadership of Judy Kuhagen, undertook a complete review of the 545 LCRI, *Library of Congress Rule Interpretations*, the body of commentary that accompanies the *Anglo-American Cataloguing Code*, 2<sup>nd</sup> edition (AACR2). Over a period of several months, each RI was re-evaluated in the light of its relevance and appropriateness to RDA, where numerous instructions differ from AACR2, and where there is substantially greater reliance on cataloger judgment when cataloging individual resources. In the course of the review, many RI's were abandoned, others were revised, and new commentary was written for some RDA instructions. The result achieved a much smaller body of commentary that was given the title *Library of Congress Policy Statements*. In acknowledgement of their efforts on this project, the PSD chief recommended the descriptive specialists for a Group award, which they received in July. There were also technical accomplishments in the dissemination of the LCPSs that represented innovative incorporation of them as an online tool to be used in tandem with RDA.

LCPSs were made available to LC testers preparing for the RDA Test (see section below, "RDA training for the US RDA Test"), which was scheduled to begin October 1. Based on the close reading of RDA that testers had begun to give the new code, PSD was able to make further refinements to the LCPSs. The LCPSs were posted along with all other LC test documents on our Web site: <http://www.loc.gov/catdir/cpso/RDAtest/rdatest.html>. Though it was widely announced that the LCPSs were to be understood as no more than LC's decisions for its own internal conduct of the US RDA Test, their public availability in both Cataloger's Desktop and the RDA Toolkit was seen as useful information for all catalogers participating in the test and learning RDA. Integration of the LCPSs and the RDA Toolkit was facilitated by PSD's testing of the functionality of the file for ALA Publishing in a staging site for an update to the RDA Toolkit.

**Updated treatment of reproductions.** The Library of Congress did not adopt the rule in AACR2 that required reproductions to be cataloged as such, with the original described in a note. Rather, LC cataloged the item reproduced by describing the original and giving information about the reproduction in a note. *RDA: Resource Description and Access* absorbed the same basic approach as found in AACR2 to catalog the reproduction and mention the relationship to the original. The full-scale reevaluation of cataloging policy decisions necessitated by the planned test of RDA included a review of this policy. As a result of the review, Kay Guiles and Dave Reser wrote a paper, "Reconsidering the Cataloging Treatment of Reproductions," a thorough examination of the history and cataloging treatment of them, which proposed that LC adopt the AACR2/RDA approach during the US RDA Test. The proposal was accepted by ABA Management and the paper was made publicly available on the Web. The resulting change in cataloging policy will be analyzed as part of the US RDA Test.

**Proofread RDA.** Over a period of several months, descriptive policy specialists proofread a substantial portion of the final draft of *RDA: Description and Access*, as

preparation for publication on October 1, 2010. The length of the document, which was conceived as an online tool, and its complexity with regard to content, layout, graphic presentation, and links between rules, were a major production challenge.

## **Training**

**RDA training for the US RDA Test.** LC announced last fiscal year that there would be a U.S. national libraries test of RDA to determine whether it would be adopted at the Library. The Library of Congress, and mainly in PSD, did extensive planning for the test. The test began with June-September devoted to training and practice time for the testers. Preparations occupied the descriptive specialists for the entire year. Virtually all the documentation, hundreds of documents each of which went through several drafts, was conceived and written by Judy Kuhagen, with assistance mainly from Dave Reser and Ana Cristán. Because other libraries also wanted to join the test (26 institutions became official testers), use of our documentation became national, not confined only to LC staff, even though we made clear that certain decisions about cataloging procedures during the test were designed specifically to elicit information that LC wanted in order to evaluate the success of the test internally. The training program at LC began with lead testers at LC and subsequently expanded to all LC testers, and training was extensive. Conducted by Judy, Chief Barbara Tillett, Dave Reser, and Ana Cristán it consisted of a range of instructional sessions, from relatively formal presentations using handouts and PowerPoint slides, to meetings with small groups of catalogers from individual divisions and cataloging sections, where discussion and review of practice records catalogers had completed could concentrate on the specific subject or format the group specialized in. The formal sessions were also provided outside LC, both nationally and internationally, where interest in the RDA documentation we had produced was high. We also set up a public email address, [LChelp4rda@loc.gov](mailto:LChelp4rda@loc.gov), for questions, which we received by the hundreds (and replied to by Judy, Dave, and Ana). Between February and September, there were approximately ten training sessions a month offered inside the Library. Catalogers submitted over 400 practice bibliographic and authority records, all of which were reviewed by Judy, Dave, and Ana.

Prior to the ALA midwinter meeting in Boston, Chief Barbara Tillett and Judy Kuhagen conducted RDA training at Northeastern University for key staff of the 26 institutions that planned to be formal participants in the U.S. RDA Test. The 9 presentations during the all-day session were filmed for later Webcast from LC. Loche McLean monitored the progress of the video creation and organization, found the best method of file receipt, and tended to the final LC processing and posting of the videos.

**Plans for Directorate-wide subject training completed.** In response to a request from Beacher Wiggins, Director for Cataloging, that was based on training needs identified in an ABA staff survey, PSD staff (Tom Yee, Libby Dechman, Janis Young, Patricia Hayward, and Mary Kay Pietris), in cooperation with the Instructional Design and Training Division, developed a comprehensive curriculum for the training of professional and support staff in subject cataloging. The open-ended plan, which was approved by the ABA management team in September, contains 33 courses (mostly of

three hours each) in three streams for both professional and support staff, including mandatory courses, elective courses, and options to add additional courses staff may request at a later time. Also included is a general course that will be open to all staff, not just those in cataloging.

### **Improving systems**

**Catalogers Desktop next generation.** The *Cataloger's Desktop* product manager is Bruce Johnson. During FY10, *Cataloger's Desktop 3.0*, a major modernization of its popular web-based subscription service of important cataloging and metadata resources, was launched. *Desktop* expanded to provide access to more than 300 electronic manuals, cataloging and classification standards, procedures, and resources.

The new 3.0 version added operational enhancements that greatly expanded its search and information-discovery features. It incorporated cutting-edge searching and navigation techniques, including fuzzy matching; finding/excluding similar resources; dynamic drill-downs; contextual analysis; search relevancy; remembering search histories; query federation; faceted search drill-downs; and a search engine that adapts to a user's search behavior.

Efforts to reach agreement with the publishers of the new cataloging standard, *RDA: Resource Description and Access*, to incorporate RDA into *Cataloger's Desktop* were successful, and it was added to *Cataloger's Desktop* as soon as it became available to the public in June 2010. *Library of Congress Policy Statements* (LCPS), to be used in conjunction with RDA, were also added to RDA and *Cataloger's Desktop*, thereby making RDA and LCPS considerably easier to use for catalogers within LC and worldwide. *Cataloger's Desktop* development staff also provided extensive assistance to RDA developers to speed their deployment of LCPS within their own subscription product, the *RDA Toolkit*.

**ClassWeb enhancements in test.** Patricia Hayward is the product manager of *Classification Web*, the online version of the *Library of Congress Classification* scheme (LCC). This year *ClassWeb* benefitted from a number of enhancements that were rolled into test production at the end of August 2010 and were being tried out by LC users as the fiscal year closed. The enhancements include the addition of the LC/NACO authority file (personal and corporate names), expansion of the correlations feature to provide correlations between the National Library of Medicine classification and LCC, a new design layout for a "fresher" look, better navigation tools, and an updated "Help" file. These enhancements were achieved while preserving users' familiarity with the former system. At the same time, there were also upgrades of the internal system to ensure continuous operation and better performance. Patricia attended ALA Midwinter in Boston to highlight these upcoming enhancements, which she demonstrated in the LC exhibit area.

**LCSH Weekly List process contract.** We were pleased to be able to initiate process and system improvements of the LCSH Weekly Subject Lists that will facilitate easier submission of proposals, and will enable us to more easily and quickly maintain

the master copies of authority records (which are maintained in the high-security LCSH Master Database). Catalogers have been able to submit classification proposals online for several years, but the subject proposal system in use has been a cumbersome and labor-intensive legacy. Some type of revamped system has been sought for several years, and in this fiscal year we finally received approval to go forward with a new vendor. Loche McLean coordinated the funding, which is being provided through CDS, assessed the impact the new system would be likely to have on the sale of CDS products, and began collaborating with Ron Goudreau in the development of specifications for the operation of the new system. Loche's recommendation will save the Library over \$150,000.

**LC switch to Outlook's negative impact on archived PSD emails.** The move from GroupWise to Outlook caused a negative impact on PSD's archived emails from LC's and other catalogers worldwide, delaying response to older messages. Major efforts continue to catch up on the few hundred remaining archived messages.

**Law Portal progress.** Jolande Goldberg's vision of a Web gateway or portal for the law materials related to indigenous peoples reached another milestone this fiscal year with the explorations with the Law Library to incorporate this Law Portal into the new Web environment being upgraded by the Law Library. More details are included in the Appendix consolidating the monthly highlights of the year's activities.

### **Enhancing multilingual access (see also LCSH/SKOS multilingual initiatives above)**

**Romanization procedures for future creation/maintenance of tables.** In the course of revising some of the ALA-LC romanization tables, PSD became concerned about the absence of consistency in how these tables were developed, reviewed, and revised. Bob Hiatt led an assessment of the need for guidelines and subsequently drafted "Procedural Guidelines for Proposed New or Revised Romanization Tables," which were posted for comment on several library Listservs, approved, and issued as current practice by the end of the fiscal year. Work began to convert current romanization tables to Word format by the end of calendar 2010 to better enable future proposals for changes or for new tables.

**VIAF expansion.** Since the Virtual International Authority File was founded several years ago as a joint project of the Library of Congress, OCLC, the Deutsche Nationalbibliothek, and the Bibliothèque nationale de France, its membership has grown to 18 national libraries and other research institutions whose personal name authority files have been added. Five other institutions had test records under review at the end of this fiscal year. VIAF's goal is to lower the cost and increase the utility of library authority files by matching and linking the authority files of these institutions and then making that information freely available on the Web. This year, with participation and planning by VIAF co-founder Barbara Tillett, VIAF moved to beta phase and became available for all to search at <http://viaf.org/>. At that time, use of VIAF for cataloging done in the U.S. was promoted by an announcement from Ana Cristán encouraging



NACO catalogers to use the VIAF as a reference source for indentifying persons and for resolving conflicts and disambiguation of personal names as needed. During August and September 2010, VIAF began adding corporate name data from some of the participating institutions, thereby greatly increasing its usefulness.

**MulDiCat upgrades with IFLA.** As part of the IFLA effort to post multilingual aids for translators and systems, Lucas Graves and Barbara Tillett upgraded *MulDiCat* (*Multilingual Dictionary of Cataloguing Terms and Concepts*) to include all the *Glossary* terms from the 24 language versions of the *International Cataloguing Principles*. The result was posted temporarily as a Word table on IFLANET as well as a SKOS version. It is hoped IFLA eventually will provide more functionality to make such a tool of greater use for translators.

### **Continually improving LC's bibliographic and authority data**

PSD staff review daily reports of errors and correct our data for bibliographic and authority records. Ongoing projects improve the data, including providing validation records for subject heading validation in Voyager, correcting typos, adding missing records as a by-product of the Baseline Inventory Project, and updating headings resulting from each LCC and LCSH Weekly editorial meeting.

The Data Integrity Section processed over 11,700 new subject heading proposals (most of which appeared on weekly lists), and over 8,300 revised subject headings (all of which appeared on weekly lists). The work was all accomplished with a staff of two assistant editors, Betty Rinn, and Sabreen Madyun. Tentative weekly list 1022 (June 22) was the largest weekly list ever produced with 768 proposals all related to the change from Cookery to Cooking. As a result of the subject heading change there were over 100,000 bibliographic records needing corrections or additions of headings. To date more than 40,000 bibliographic records have been changed. These transactions have brought the total number of subject authority records in the master database to 400,198 records. There were 2,674 classification proposals that appeared on weekly lists. The total number of classification records is now over 629,000. At the end of the year there were no backlogs of proposals, and all ongoing activities regarding proposals were on target.

This year a new workflow for correcting subject heading changes that appear on weekly lists that was begun last year by Ron Goudreau, the LCSH Editor, resulted in 312,009 bibliographic records corrected by Ron and Lucas Graves using BatchCat and manual, one-by-one correction procedures. This represents a significant increase from the 255,400 reported last fiscal year. The improvement introduced during the year to BatchCat, namely the capability to correct all bibliographic records with the single exception of OCLC records, was introduced and has worked successfully contributing to the increase in the number of records corrected.

Data Integrity Section members Cassandra Harris, Jacqueline Jenkins, and Marian Johnson continued to upgrade preliminary bibliographic records input by contractors on the Baseline Inventory Project (BIP). The Data Integrity Section upgraded over 26,125 of these records. In addition to upgrading BIP records

Cassandra Harris upgraded subject headings appearing in OCLC serial records. Over 1,000 OCLC records were changed to reflect current subject terminology.

The creation of validation records continued at a steady pace during the year with 33,200 records being created by program, a very substantial increase over last years' production of 8,500. To date there are over 78,400 validation records in the LCSH master file.

During the year Demaris Thompson continued to assist in working with the annotated meeting copy of the subject headings weekly list by updating the list with the changes made at the editorial meeting whenever circumstances prevented the assistant editor from doing so. Jacqueline Jenkins continued to assist in preparing the tentative subject headings weekly list.

See Appendix 1. Statistics for more details.

## **Space & Move**

The reorganization of the former Cataloging Directorate as ABA (Acquisitions and Bibliographic Access Directorate), a reorganization that became effective October 1, 2008, prompted extensive relocation of staff and physical rearrangement of work space, including providing temporary "swing" spaces for some units between their previous location and new location. Under the direction of PSD assistant chief Tom Yee, Space & Move activities were already under way when this fiscal year began. The focus of ABA Space & Move work during FY10 was on space planning, although some moves did take place in March 2010. The fiscal year began with modification of the Move database to accommodate tracking of staff moves into and out of temporary swing space during various construction phases. In January 2010, Rebecca Williams, ALAWE Automated Operations Coordinator, was detailed to the Office of the ABA Director for three years to work exclusively on space and move issues related to the ABA reorganization. For the duration of this detail, Tom Yee is Ms. Williams' immediate supervisor. After all divisions had an opportunity to familiarize themselves with their new location and new staff workflows, Rebecca Williams and Tom Yee met with each Madison 5<sup>th</sup>-floor division to review the blocking plans prepared by WDG (FD&C contractor) during their FY09 contract, to revise those plans as needed, and then to track revisions through the preparation of 50% furniture plans by WDG. For ABA divisions located on the ground and basement floors of the Madison building, which had not been covered by the FY09 WDG contract, Space & Move worked with the FD&C project coordinator, Lori Day, and the management teams of USAN and AFS to identify their space needs, prepare and review programming spreadsheets, and review and revise blocking plans developed by WDG.

In response to a request from FD&C to empty LM 547 for use as swing space during the ABA Renovation, Space & Move coordinated the move of the Music Bibliographic Access Sections and the Cooperative Programs Section (COIN) to temporary locations in LM 542 and LM 522 in March 2010. In an extremely short time frame, Connie Pierce (USGEN/LIT Section) prepared paperwork for APLO and ITS to use in moving computers and phones.

During the last three quarters of the fiscal year, extensive planning has been underway for Phase 1 and the LM 547 swing space. This has involved meeting with

ALawe, ASME and FD&C staff to review and modify floor plans to address their needs and to identify collections, furniture and other materials which must travel to swing space. Seat selection for both swing space and Phase 1 post-renovation permanent locations was conducted. In support of the proposed reorganization of the USGEN and USPL divisions, Space & Move developed a proposal for allocation of space in the future divisions and Rebecca Williams gave a PowerPoint presentation to staff of the two divisions in August 2010. Rebecca met with several USGEN and USPL section heads to discuss revisions of floor plans to reflect the needs of the sections that will occupy the space after the US divisions reorganize. Space & Move also worked with the Office of Security and Emergency Preparedness (OSEP) to identify and prioritize doors located on the LM 5<sup>th</sup> floor to receive card-readers for collection security.

### **Personnel changes**

Although hired in September 2009, Sabreen Madyun, and Ethel Tillman, the first new staff members in over ten years, reported for duty in October 2009. The infusion of new staff resulted in healthy increases in the amounts of work produced. Allis Robinson (with more than 38 years of service) and Marian Johnson (with more than 35 years of service) retired in July and September 2010, respectively, both from the Data Integrity Section, reducing the staff level of that Section to eleven.

**Appendix 1**  
**STATISTICS, FY 2010**

<b>CATEGORY</b>	<b>SUBTOTAL</b>	<b>TOTAL</b>
<b>RECORD CREATION AND MODIFICATION</b>		
<b>Authority records created or modified</b>		
Names/series created		1673
Subjects created		11,700
155 genre/form terms		700
Validation records		33,200
Subjects revised		8,300
<b>Bibliographic records created or modified</b>	~25% increase over FY09	441,033
By Data Integrity Section	353,833	
By Policy Section	87,200	
<b>Classification records created or modified</b>		2,674
Schedule records	2,461	
Table records	213	
<b>Item records created</b>		
Pieces inventoried		9,256
<b>PROJECTS</b>		
<b>Music 053 Project</b>		
Name authority records to which 053 added		89
Other NARs created or updated		7
Bibliographic records updated		24
Items reclassified		4
<b>Training for LC RDA test</b>		
Training sessions		97

<b>CATEGORY</b>	<b>SUBTOTAL</b>	<b>TOTAL</b>
Practice RDA records by testers checked		>720
<b>Veterans History Project</b>		
Contents notes prepared		16
<b>INVENTORY CONTROL</b>		
<b>Ft. Meade</b>		
Copy 2's, unassessed encoding level 3, added volumes sent		577
LCCN duplicates reconciled		263
Replacement copies added to the general collections		60
<b>AMED Kane Collection</b>		
Copies added		258
<b>CATALOGING AND CATALOGING REVIEW FOR OTHER DIVISIONS</b>		
<b>Law Library</b>		
Titles reclassified from LAW		43
<b>INTERNAL AND EXTERNAL RELATIONS</b>		
<b>Correspondence</b>		
Incoming (PSD email account messages)		6,321
Weekly average	122	
Outgoing		8,111
Internal	4,659	
External	3,452	
<b>Error reports received</b>		343
Internal	95	
External	248	

<b>CATEGORY</b>	<b>SUBTOTAL</b>	<b>TOTAL</b>
<b>Phone queries</b>		812
Internal	752	
External	60	
<b>Visitors</b>		159
Internal	116	
External	43	

## APPENDIX 2

### PRINT AND ELECTRONIC PUBLICATIONS FY 2010

As of December 2005, the publication schedules of PSD publications reproduced in *Cataloger's Desktop* are coordinated with the quarterly updates to *Desktop*. Some publications are available both in print and electronically.

#### I. Scheduled publications

- ALA-LC Romanization Tables: Transliteration Schemes for Non-Roman Script*
  - Greek
  - Greek, (rev.)
  - Green, Ancient
  - Greek, Modern
- Cataloging Service Bulletin. (Quarterly)*
  - no. 125, Fall 2009
  - no. 126, Winter 2009
  - no. 127, Spring 2010
  - no. 128, Summer 2010
- Classification and Shelving Manual*
  - Update no. 1 (March)
- Descriptive Cataloging Manual*
  - Additions and revisions in whole or in part
    - B6
    - C8
    - C16
    - M4
    - Z1
  - LC Supplement to the MARC 21 Format for Authority Data
    - 2009, Update no. 4
    - 2010, Update no. 1
    - 2010, Update no. 2
- Free-Floating Subdivisions: an Alphabetical index. 22<sup>nd</sup> ed. (Annual)*
- LC Classification; Weekly Lists (Tentative; Approved)
- LC Subject Headings; Weekly Lists (Tentative; Approved)
- Library of Congress Classification, new editions*
  - K Tables: Form Division Tables for Law*
  - Class M Music*
  - Subclass P-PA Philology and Linguistics*
  - Subclass PB-PH Modern European Languages*
  - Subclass PL-PM Languages of Eastern Asia, Africa, Oceania.*
    - Hyperforean, Indian, and Artificial Languages*
  - Class T Technology*
- Library of Congress Rule Interpretations, 2<sup>nd</sup> ed., 1989*

## Additions and revisions in whole or in part

1.4  
1.6  
1.6B  
1.6J  
1.11A  
2.7B17  
12.6B1  
13.3  
21.3B  
21.30L  
22.18A  
26.1  
26.2  
26.3  
26.5A  
Current LCRI  
Index

2009, Update No. 4 (November)

2010, Update No. 1-2 (March)

2010, Update No. 3 (August)

*Library of Congress Subject Headings*, 32<sup>nd</sup> ed., 2010. 6 v.

Vol. 5, *Supplemental Vocabularies*, also available separately

*The 32nd edition of Library of Congress Subject Headings was produced in September using a new contractor. The Editor participated in of the review of the product before publication. The 6<sup>th</sup> volume, Supplementary Vocabularies, includes over 700 Genre/Form terms, in addition to the list of 3,578 Free-floating Subdivisions, and the 901 Children's Subject Headings.*

*Subject Headings Manual*, 2008 ed. (formerly, *Subject Cataloging Manual: Subject Headings*)

2010 Update No. 1 (February)

2010 Update No. 2 (August)

## II. Other publications

Includes “born digital” text materials and Webcasts; excludes Web-posted drafts of documentation, discussion papers, etc.

### Webcasts

“Resource Description and Access: Background / Overview”  
([http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4320](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4320));

“Cataloging Principles and RDA: Resource Description and Access”  
([http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4327](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4327))

“FRBR for Non-Catalogers” (“FRBR: Things You Should Know, But Were Afraid to Ask” ([http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4554](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4554)));



“RDA: Antecedentes y aspectos de su implementación”  
([http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4736](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4736));  
“RDA Changes from AACR2 for Texts”  
([http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4863](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4863));  
“RDA Test ‘Train the Trainer’ (Training modules)”  
(<http://www.loc.gov/bibliographic-future/rda/trainthetrainer.html>)  
“RDA Train-the-Trainer Webcasts (<http://www.loc.gov/bibliographic-future/rda/trainthetrainer.html>), filmed March 1, 2010: ‘Module 6: Identifying Families’”  
“Cataloger’s Desktop 3.0: What’s New”  
([http://www.loc.gov/cds/desktop/training/1-Whats\\_New.wmv](http://www.loc.gov/cds/desktop/training/1-Whats_New.wmv) )  
“Cataloger’s Desktop 3.0: Que es Nuevo”  
([http://www.loc.gov/cds/desktop/training/1e-Whats\\_New.wmv](http://www.loc.gov/cds/desktop/training/1e-Whats_New.wmv) )  
“Account Management & Logging in the First Time”  
(<http://www.loc.gov/cds/desktop/training/2-Login.wmv> )  
“Setting up Preferences”  
(<http://www.loc.gov/cds/desktop/training/3-Preferences.wmv> )  
“Getting the Most out of Search”  
(<http://www.loc.gov/cds/desktop/training/4-Search.wmv> )  
“Saving Bookmarks and Searches”  
(<http://www.loc.gov/cds/desktop/training/5-Bookmarks.wmv> )

#### **Acquisitions procedural documents.**

“Duplicate Materials Exchange Program (DMEP) Overview”  
([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Overview\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Overview_F.pdf))  
“Canceling a Duplicate Materials Exchange Program (DMEP) Partner “  
([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Cancel\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Cancel_F.pdf))  
“Dual Exchange Arrangements for Individual Institutions”  
([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Dual%20Exchanges\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Dual%20Exchanges_F.pdf))  
“Duplicate Materials Exchange Program (DMEP) Quotas”  
([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Quotas\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Quotas_F.pdf));  
“Establishing New Duplicate Materials Exchange Program (DMEP) Partners”  
([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Establish%20new%20partners\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Establish%20new%20partners_F.pdf)).

#### **Cataloger’s Desktop documents.**

##### **Webcasts.**

“Cataloger’s Desktop 3.0: What’s New”  
([http://www.loc.gov/cds/desktop/training/1-Whats\\_New.wmv](http://www.loc.gov/cds/desktop/training/1-Whats_New.wmv))  
“Cataloger’s Desktop 3.0: Que es Nuevo”  
([http://www.loc.gov/cds/desktop/training/1e-Whats\\_New.wmv](http://www.loc.gov/cds/desktop/training/1e-Whats_New.wmv))  
“Account Management & Logging in the First Time”  
(<http://www.loc.gov/cds/desktop/training/2-Login.wmv>)  
“Setting up Preferences”  
(<http://www.loc.gov/cds/desktop/training/3-Preferences.wmv>)  
“Getting the Most out of Search”

(<http://www.loc.gov/cds/desktop/training/4-Search.wmv>)

“Saving Bookmarks and Searches”

(<http://www.loc.gov/cds/desktop/training/5-Bookmarks.wmv>)

### **Powerpoints.**

“Cataloger’s Desktop: What’s New”

([http://www.loc.gov/cds/desktop/training/1-Whats\\_New.ppt](http://www.loc.gov/cds/desktop/training/1-Whats_New.ppt))

“Account Management & Logging in the First Time”

(<http://www.loc.gov/cds/desktop/training/2-Login.ppt>)

“Setting up your Preferences”

(<http://www.loc.gov/cds/desktop/training/3-Preferences.ppt>)

“Getting the Most out of Search”

(<http://www.loc.gov/cds/desktop/training/4-Search.ppt>)

“Saving Bookmarks and Searches”

(<http://www.loc.gov/cds/desktop/training/5-Bookmarks.ppt>)

### **Manuals, etc.**

“Cataloger’s Desktop 3.0: Tools and Functionality: Course Manual”

([http://www.loc.gov/cds/desktop/training/Tools\\_and\\_Functionality.pdf](http://www.loc.gov/cds/desktop/training/Tools_and_Functionality.pdf))

“Account management & Logging in the First Time: At-a-Glance”

(<http://www.loc.gov/cds/desktop/training/2-Login.pdf>)

“Setting up your Preferences: At-a-Glance”

(<http://www.loc.gov/cds/desktop/training/3-Preferences.pdf>)

“Getting the Most out of Search: At-a-Glance”

(<http://www.loc.gov/cds/desktop/training/4-Search.pdf>)

“Saving Bookmarks and Searches: At-a-Glance”

(<http://www.loc.gov/cds/desktop/training/5-Bookmarks.pdf>)

“Using RDA Toolkit with Cataloger’s Desktop: At-a-Glance”

(<http://www.loc.gov/cds/desktop/training/6-RDA.pdf>)

“Quick Tasks: Quicktips”

(<http://www.loc.gov/cds/desktop/tips/cd3quicktasks/cd3quicktasks.htm>)

“Shortcuts: Quicktips”

(<http://www.loc.gov/cds/desktop/tips/cd3shortcuts/cd3shortcuts.htm>)

### **Other**

A test version of the new enhanced version of *Classification Web* was made available at <http://209.18.108.38/Auto/>

“Library of Congress Rule Interpretations (LCRI). Current LCRI”

(<http://www.loc.gov/catdir/cpsocurr/crri.pdf>)

“Policy and Standards Division Annual Report FY 2009

(<http://www.loc.gov/catdir/cpsocurr/annrepps09.pdf>)

## Appendix 3

### COMPILATION OF MONTHLY HIGHLIGHTS

#### I. Communications, Documentation, Publications

##### Emails in-house.

**October 7:** New 906 \$c codes (serials/integrating resources) with attachment “Field 906 \$c Codes for Serials & Integrating Resources as of October 13, 2009.”

**October 9:** Rev. New 906c codes (serials/integrating resources) with attachment “Field 906 \$c Codes for Serials & Integrating Resources as of October 13, 2009.”

**November 2:** “Fwd: Cataloger’s Desktop: Instructions for LC catalogers on Capitol Hill” with attachment: “Cataloger’s Desktop: Logging in for the First Time At-a-Glance.”

**November 12:** “Fwd: The Virtual International Authority File (VIAF) and NACO.”

**November 13:** “Disposition of LCSH video recordings headings.”

**November 23:** “Cartographic form subdivisions.”

**December 29:** “Follow-Up: Revision of Headings for Cooking and Cookbooks—Please respond by Jan 7, 2010.”

**January 4:** “Special shelf-number generators for 2010.”

**January 11:** “ABA units and item status in item record,” with attached Word document; “Pre v. post update for SAC revised.”

**January 14:** “Revision of headings for Cooking and Cookbooks: Library of Congress Decisions.”

**January 21:** “Hierarchies for moving image genre/form headings.”

**January 22:** “Assignment of staff codes for Voyager (revised);”

**January 28:** “Classification revision for Iraq War.”

**February 4:** “2<sup>nd</sup> indicator in 100, 110, 111 NARs (reminder).”

**March 15:** “Opportunity for subject consultation.”

**March 23:** “Duplicate Name Authority Records—Reminder. “Duplicate NARs—statistics.”

**March 31:** “Please do **NOT** substitute item barcodes.”

**April 2:** “LC’s Digital Future & You! webcast on RDA now available.”

**April 9:** “Rev. guidelines for setting Item Status,” with attachment “Guidelines for Setting Item Status in ABA Sections.”

**May 10:** “Put call number label in upper left quadrant on unbound non-rare items;”

**May 18:** “Subject Headings for Cooking and Cookbooks.”

**June 9:** “LC to formally separate genre/form terms from LCSH.”

**June 15:** “FW: New Voyager Tag Tables Distributed Today (Tues. June 15).”

**June 22:** “Changes to Subject Headings for Cooking and Cookbooks.”

**July 21:** “Genre/form headings for cartographic materials.”

**July 29:** “ABA Chiefs: Please forward subject policy details announcement.”

**August 9:** Subject cataloging documentation update – discontinuation of ‘D’ memos” with attachment “Disposition of material from the *Subject Cataloging Manual: General Cataloging Procedures*.”

**August 16:** “Do Your Staff Need authority Control Training?”

**September 23:** “FAQ; LC’s RDA Test records” with attachment, “Frequently Asked Questions about LC’s US RDA Test Records;” “Using existing records during the RDA

Test: policies from LC and OCLC,” with attachments, “Adding RDA elements/fields to existing OCLC and non-RDA Records” and “Using existing bibliographic records for books: LC RD testers (technicians and catalogers).”

**September 27:** “Reminder: Cataloging concepts classes for technicians.”

**September 29:** “Change in LC policy: NAR 370 field,” with attachments, “RDA Authority Records” and “US RDA Test Policy for the Extra Set: Use of Existing Authority and Bibliographic Records;” “Opportunities for subject consultation (schedule through December 2010)” with attachment: “Subjects: What can Policy\* do for you?” “Revised version of document: RDA core elements for LC” with attachment: “LC RDA Elements for the RDA Test (combination of RDA “Core and RDA “Core if” elements plus additional elements. [Training document #4].”

**September 30:** “*Classification Web* access issue.”

### **Listserv postings on various professional Listservs (AUTOCAT, PCCLIST, etc.).**

**November 16:** “Disposition of LCSH video recording headings.”

**November 17:** LCSH in SKOS.

“The Virtual International Authority File (VIAF) and NACO.”

**December 23:** “Follow-Up: Revision of Headings for Cooking and Cookbooks” (with reference to: <http://www.loc.gov/catdir/cpsocooking2.pdf>).

**January 11:** “Library of Congress Implementation of the BIBCO Standard Record.”

**January 14:** “Revision of headings for cooking and cookbooks: Library of Congress decisions.”

**January 21:** “Hierarchies for moving image genre/form headings.”

**January 28:** “Classification revision for Iraq War.”

**March 8:** “Greek romanization”.

**April 21:** “Library of Congress documentation for the RDA Test.”

**April 28:** “Cartography genre/form headings at LC.”

**April 30:** “Clarification: LCRIs and LCPSs.”

**May 10:** “Greek Romanization May Draft for Comment.”

**May 18:** “Subject Headings for Cooking and Cookbooks.”

**June 4:** “LC reconsidering the cataloging treatment of reproductions for the RDA test.”

**June 9:** “LC to formally separate genre/form terms from LCSH.”

**June 22:** “Romanization guidelines;” “Changes to Subject Headings for Cooking and Cookbooks.”

**July 14:** “Terminology Suggester on LCSH/SKOS terms in LC Authorities & Vocabularies service.”

**July 21:** “Genre/form headings for cartographic resources.”

**July 29:** “Greek romanization.”

**August 6:** “Cataloger's Desktop 2010, Issue 3 released; DCM updated.”

**August 20:** “Abbreviation ‘dept.’”

**September 28:** “Revised document ‘US RDA Test Policy for the Extra Set: Use of Existing Authority and Bibliographic Records’” with attachment: “US RDA Test Policy for the Extra Set: Use of Existing Authority and Bibliographic Records.”

**September 29:** “Library of Congress Documentation for the RDA (Resource Description and Access) Test.”

“Change in LC's policy for NAR 370 field” and attachments: “RDA Authority

Records” and “US RDA Test Policy for the Extra Set: Use of Existing Authority and Bibliographic Records.”

**September 30:** “Revised document “US RDA Test Policy for the Extra Set: Use of Existing Authority and Bibliographic Records” [version 2].

### **PSD home page.**

**November 6:** “Decision regarding the final disposition of *LCSH* headings for video recordings” (<http://www.loc.gov/catdir/cpso/videorecheadings.pdf>)

**November 9:** “Frequently asked questions about LC genre/form headings,” ([http://www.loc.gov/catdir/genre\\_form\\_faq.pdf](http://www.loc.gov/catdir/genre_form_faq.pdf))

**November 13:** “Library of Congress to Modify Structure of Form Subdivisions used for Cartographic materials” (<http://www.loc.gov/catdir/cpso/cartographic2.pdf>)

**December** Geographic Cutter Numbers (Tables G1458-G9804) quarterly update from G&M (<http://www.loc.gov/catdir/cpso/GCutters.pdf>)

**December 23:** “Follow-Up: Revision of Headings for Cooking and Cookbooks” (<http://www.loc.gov/catdir/cpso/cooking2.pdf>)

**January 8:** “Revision of Headings for Cooking and Cookbooks: Library of Congress Decisions” (<http://www.loc.gov/catdir/cpso/cooking3.pdf>)

**January 11:** “PCC Guidelines on Punctuation Used in \$3 and \$x in 250, 490, 8XX Fields” (<http://www.loc.gov/catdir/cpso/punctuation.pdf>)

**January 28:** “Revision to the Classification Span for the Iraq War” (<http://www.loc.gov/catdir/cpso/iraqwar.html>); “Tentative Revision to the Classification Span for the Iraq War” (<http://www.loc.gov/catdir/cpso/iraqwar.pdf>)

**February 10:** “Genre/Form Headings for Cartographic Materials” (<http://www.loc.gov/catdir/cpso/genrecarto.html>).

**February 17:** “SACO Proposals for Moving Image and Radio Program Genre/Form Headings” (<http://www.loc.gov/catdir/cpso/genresacol.html>)

**March:** “Subclass G (Cartographic Materials) - Geographic Cutter Numbers (Tables G1548-G9804)” (<http://www.loc.gov/catdir/cpso/gcutter.html>), (<http://www.loc.gov/catdir/cpso/GCutters.pdf>) (Quarterly update per G&M)

“News from the Library of Congress: MOUG/MLA 2010” (<http://www.loc.gov/catdir/cpso/MLA2010.doc>)

**April 21:** “Library of Congress Documentation for the RDA (Resource Description and Access) Test” (<http://www.loc.gov/catdir/cpso/RDAtest/rdatest.html>);

“Elements to be included in LC’s bibliographic and authority records beyond those identified in RDA as core elements or core elements in some situations. Elements not listed may be included according to catalogers judgement” (“LC RDA Core Elements for the RDA Test: (combination of RDA ‘Core’ and RDA ‘Core if’ elements plus additional elements);”

([http://www.loc.gov/catdir/cpso/RDAtest/LC\\_RDA\\_coreelements.doc](http://www.loc.gov/catdir/cpso/RDAtest/LC_RDA_coreelements.doc));

“Alternatives, optional omissions, and optional additions” (“RDA alternatives and options -- LC proposed practice for the RDA Test”

([http://www.loc.gov/catdir/cpso/RDAtest/RDA\\_alternatives.doc](http://www.loc.gov/catdir/cpso/RDAtest/RDA_alternatives.doc));

“Instructions referring to decisions by the ‘agency creating the data’ or ‘agency preparing the description’” (“RDA instructions referring to choices by ‘agency creating the data’ -- LC proposed practice for the RDA Test”

([http://www.loc.gov/catdir/cpsorDAtest/RDA\\_agency.doc](http://www.loc.gov/catdir/cpsorDAtest/RDA_agency.doc));

“Instructions using wording ‘or’ to refer to choices for the same situation” (“RDA ‘or’ instructions not labeled as options or alternatives -- LC proposed practice for the RDA Test” ([http://www.loc.gov/catdir/cpsorDAtest/RDA\\_%20or\\_decisions.doc](http://www.loc.gov/catdir/cpsorDAtest/RDA_%20or_decisions.doc)))

**April 27:**“Decision regarding the proposed revision to the hierarchies of moving image genre/form headings. April 9, 2010”

(<http://www.loc.gov/catdir/cpsorDAtest/movingimagehierarchiesdecision.pdf>)

“Library of Congress to Approve Genre/Form Headings for Cartographic Materials. April 26, 2010” (<http://www.loc.gov/catdir/cpsorDAtest/cartographic3.pdf>)

“U.S. International Exchange Service Findings from Survey of Partners. Acquisitions and Bibliographic Access Directorate. April 15, 2010”

(<http://www.loc.gov/acq/IESSurveyResults.pdf>)

**May.** “The Policy and Standards Division’s Progress on the Recommendations made in “Library of Congress Subject Headings Pre- vs. Post-Coordination and Related Issues ... Report for Beacher Wiggins, ABA Director; Prepared by the Policy and Standards Division. May 2, 2010” ([http://www.loc.gov/catdir/cpsorDAtest/pre\\_vs\\_postupdate.pdf](http://www.loc.gov/catdir/cpsorDAtest/pre_vs_postupdate.pdf))

**May 10:** “Library of Congress Documentation for the RDA (Resource Description and Access) Test: Library of Congress Policy Statements (LCPSs)”

([http://www.loc.gov/catdir/cpsorDAtest/rda\\_lcps.html](http://www.loc.gov/catdir/cpsorDAtest/rda_lcps.html)) (*In the following list of files, given in the order of AACR2 contents, the number of PDF files related to specific RDA instructions is given in parentheses after each.*)

LCPS Ch. 00 (17)	LCPS Ch. 16 (15)	LCPS Ch. 30 (1)
LCPS Ch. 01 (25)	LCPS Ch. 17 (3)	LCPS Ch. 32 (2)
LCPS Ch. 02 (101)	LCPS Ch. 18 (2)	LCPS App. A (2)
LCPS Ch. 03 (25)	LCPS Ch. 19 (5)	LCPS App. B (3)
LCPS Ch. 04 (4)	LCPS Ch. 20 (2)	LCPS App. D (2)
LCPS Ch. 05 (6)	LCPS Ch. 24 (3)	LCPS App. E (5)
LCPS Ch. 07 (25)	LCPS Ch. 25 (4)	LCPS App. F (4)
LCPS Ch. 08 (9)	LCPS Ch. 26 (3)	LCPS App. I (1)
LCPS Ch. 09 (23)	LCPS Ch. 27 (2)	LCPS Glossary (3)
LCPS Ch. 10 (6)	LCPS Ch. 28 (2)	
LCPS Ch. 11 (47)	LCPS Ch. 29 (2)	

“Greek Romanization” (<http://www.loc.gov/catdir/cpsorDAtest/greekroman.html>)

“Draft of Proposed Romanization Table for Greek” (“Greek”

(<http://www.loc.gov/catdir/cpsorDAtest/romanization/greekrev.pdf>))

**May 12:** “Cataloger’s Desktop and Classification Web Training and Presentations at ALA Annual Meeting” (<http://www.loc.gov/catdir/cpsorDAtest/cdsinvite.html>)

([http://www.loc.gov/catdir/cpsorDAtest/pre\\_vs\\_postupdate.pdf](http://www.loc.gov/catdir/cpsorDAtest/pre_vs_postupdate.pdf))

**May 14:** “Library of Congress Documentation for the RDA (*Resource Description and Access*) Test: Training Materials for RDA Test Participants (Jan. 2010)”

(<http://www.loc.gov/catdir/cpsorDAtest/rdatraining.html>)

“RDA Test ‘Train-the-Trainer’”

(<http://www.loc.gov/catdir/cpsorDAtest/trainingoverview.doc>)

“RDA Test Training Exercises”

(<http://www.loc.gov/catdir/cpsorDAtest/exercises.doc>)

“RDA Test Training Exercises: Answers

<http://www.loc.gov/catdir/cpsorDAtest/answers.doc>

### **Supplementary training documents**

“Controlled vocabularies” (“RDA Controlled Vocabularies: ‘Not Closed’ and ‘Closed’: Training Document #1”

<http://www.loc.gov/catdir/cpsorDAtest/controlled.doc>)

“Where is it in RDA” (“Where is it in RDA?: Training document #2”

<http://www.loc.gov/catdir/cpsorDAtest/whereisit.doc>)

“RDA Elements: Training Document #3”

<http://www.loc.gov/catdir/cpsorDAtest/elements.doc>)

“RDA Core Elements: Training Document #4”

<http://www.loc.gov/catdir/cpsorDAtest/coreelements.doc>)

“MARC 21 Encoding to accommodate RDA Elements” (“MARC 21 encoding to accommodate RDA elements: LC practice for the RDA Test: original cataloging Training Document #5”

<http://www.loc.gov/catdir/cpsorDAtest/MARC21changes.doc>)

### **PowerPoint files**

“RDA opening slide”

<http://www.loc.gov/catdir/cpsorDAtest/openingslide.ppt>);

“RDA module 1 overview”

<http://www.loc.gov/catdir/cpsorDAtest/module1.ppt>)

“RDA module 2 structure”

<http://www.loc.gov/catdir/cpsorDAtest/module2.ppt>)

“RDA module 3 description”

<http://www.loc.gov/catdir/cpsorDAtest/module3.ppt>)

“RDA module 4 works” (<http://www.loc.gov/catdir/cpsorDAtest/module4.ppt>)

“RDA module 5 person” (<http://www.loc.gov/catdir/cpsorDAtest/module5.ppt>)

“RDA module 6 families”

<http://www.loc.gov/catdir/cpsorDAtest/module6.ppt>)

“RDA module 7 corporate”

<http://www.loc.gov/catdir/cpsorDAtest/module7.ppt>)

“RDA module 8 relationships”

<http://www.loc.gov/catdir/cpsorDAtest/module8.ppt>)

“RDA module 9 review” (<http://www.loc.gov/catdir/cpsorDAtest/module9.ppt>)

“RDA quiz” (<http://www.loc.gov/catdir/cpsorDAtest/quiz.pps>)

“RDA exercise answers”

<http://www.loc.gov/catdir/cpsorDAtest/answers.ppt>)

### **Webcasts**

“Resource Description and Access: Background / Overview”

[http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4320](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4320));

“Cataloging Principles and RDA: Resource Description and Access”

[http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4327](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4327))

“FRBR for Non-Catalogers” (“FRBR: Things You Should Know, But Were Afraid to Ask” ([http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4554](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4554)));

“RDA: Antecedentes y aspectos de su implementación”

[http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4736](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4736));

“RDA Changes from AACR2 for Texts”

([http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4863](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4863));  
 “RDA Test ‘Train the Trainer’ (Training modules)”  
 (<http://www.loc.gov/bibliographic-future/rda/trainthetrainer.html>)

**May 19:** “The Policy and Standards Division’s Progress on the Recommendations made in ‘Library of Congress Subject Headings Pre- vs. Post-Coordination and Related Issue’...May 2, 2010” ([http://www.loc.gov/catdir/cpsopre\\_vs\\_postupdate.pdf](http://www.loc.gov/catdir/cpsopre_vs_postupdate.pdf))

**May 24:** “Library of Congress Documentation for the RDA (Resource Description and Access) Test” (<http://www.loc.gov/catdir/cpsordatest/rdatest.html>).

**June:** “Subclass G (Cartographic Materials) - Geographic Cutter Numbers (Tables G1548-G9804)” (<http://www.loc.gov/catdir/cpsogcutter.html>),  
 (<http://www.loc.gov/catdir/cpsogcutters.pdf>) (Quarterly update per G&M)

**June 10:** “Korean Bibliographic File Maintenance”  
 (<http://www.loc.gov/catdir/cpsokoreanbfm.html>);  
 “Library of Congress Documentation for the RDA (Resource Description and Access) Test: Training Materials for LC Core RDA Elements”  
 (<http://www.loc.gov/catdir/cpsordatest/rdatraining2.html>);  
 “LC RDA Test Training: June 2010”  
 (<http://www.loc.gov/catdir/cpsordatest/training2word1.doc>)

**June 17:** Library of Congress to Formally Separate LC Genre/Form Thesaurus from LCSH” (<http://www.loc.gov/catdir/cpsogenreformthesaurus.html>)

**June 22:** “US RDA Test Record Collection Plan”  
 (<http://www.loc.gov/catdir/cpsordatest/admindoc2.doc>)

**June 24:** “Cooking and Cookbooks H 1475” (<http://www.loc.gov/catdir/cpsoh1475.pdf>)  
 “Library of Congress Documentation for the RDA (Resource Description and Access) Test” (<http://www.loc.gov/catdir/cpsordatest/rdatest.html>);  
 “Revision of Subject Headings Manual H 1475 for Cooking and Cookbooks”  
 (<http://www.loc.gov/catdir/cpsoh1475.html>)

**July 2:** “Genre/Form Headings for Musical Works”  
 (<http://www.loc.gov/catdir/cpsogenremusic.html>);  
 “Candidate Music Genre/Form Terms for Discussion”  
 (<http://www.loc.gov/catdir/cpsomusicterms.html>);  
 “Medium of Performance for Music: Working List of Terminology”  
 (<http://www.loc.gov/catdir/cpsomedprf.html>)

**July 16:** “Library of Congress Documentation for the RDA (Resource Description and Access) Test: Work Forms and Checklist for RDA Practice Records (until October 1, 2010);” (<http://www.loc.gov/catdir/cpsordatest/rdaworkforms.html>);  
 “Checklist: Creating LC practice records for the RDA Test”  
 (<http://www.loc.gov/catdir/cpsordatest/checklist.doc>).

**Workforms for RDA practice bibliographic records:**  
 “BOOK: Single-part or multipart (LC core elements)”  
 (<http://www.loc.gov/catdir/cpsordatest/bibbook.doc>);  
 “DVD-video (LC core elements)”  
 (<http://www.loc.gov/catdir/cpsordatest/bibdvd.doc>);  
 “Map (LC core elements)” (<http://www.loc.gov/catdir/cpsordatest/bibmap.doc>);  
 “Music CD (LC core elements)”  
 (<http://www.loc.gov/catdir/cpsordatest/bibmusiccd.doc>);



“Textual PDF Monograph: Single-part or multipart (LC core elements)”  
(<http://www.loc.gov/catdir/cpsorDAtest/bibpdfmono.doc>);

“Printed Text On Paper Serial (LC core elements)”  
(<http://www.loc.gov/catdir/cpsorDAtest/bibprintedserial.doc>);

“Remote Access Text Serial (LC core elements)”  
(<http://www.loc.gov/catdir/cpsorDAtest/bibremoteaccessserial.doc>);

“Score: Single-part or multipart (LC core elements)”  
(<http://www.loc.gov/catdir/cpsorDAtest/bibrecordscore.doc>);

“Updating Looseleaf (LC core elements)”  
(<http://www.loc.gov/catdir/cpsorDAtest/bibupdatinglooseleaf.doc>);

“Primarily Textual Updating Web Site (LC core elements)”  
(<http://www.loc.gov/catdir/cpsorDAtest/bibupdatingwebsite.doc>)

**July 20:** “Library of Congress to Implement Cartographic Genre/Form Headings. July 9, 2010” (<http://www.loc.gov/catdir/cpsorcartographic4.pdf>)

#### **Workforms for RDA practice authority records:**

“Corporate Body – Conference”  
(<http://www.loc.gov/catdir/cpsorDAtest/authconf.doc>)

“Corporate Body -- Not Conference”  
(<http://www.loc.gov/catdir/cpsorDAtest/authcorp.doc>)

“Expression -- No Creator of Work”  
(<http://www.loc.gov/catdir/cpsorDAtest/authexpressionnocreator.doc>)

“Expression -- With Creator of Work”  
(<http://www.loc.gov/catdir/cpsorDAtest/authexpressionwithcreator.doc>)

“Family” (<http://www.loc.gov/catdir/cpsorDAtest/authfamily.doc>)

“Person” (<http://www.loc.gov/catdir/cpsorDAtest/authperson.doc>)

“Work -- No Creator”  
(<http://www.loc.gov/catdir/cpsorDAtest/authworknocreator.doc>)

“Work -- With Creator”  
(<http://www.loc.gov/catdir/cpsorDAtest/authworkwithcreator.doc>)

**August 1:** “LC RDA Core Elements for the RDA Test” (combination of RDA “Core” and RDA “Core if” elements plus additional elements)  
(<http://www.loc.gov/catdir/cpsorDAtest/training2word7.doc>)

**August 12:** “FAQ on genre/form headings” (“Frequently Asked Questions about Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT). Revised August 12, 2010” ([http://www.loc.gov/catdir/cpsor/genre\\_form\\_faq.pdf](http://www.loc.gov/catdir/cpsor/genre_form_faq.pdf)))

**August 13:** “FAQ en Español” (“Preguntas frecuentes (FAQ) sobre los términos género/forma de la Library of Congress (LC):”  
([http://www.loc.gov/catdir/cpsor/genre\\_form\\_faq\\_spanish.html](http://www.loc.gov/catdir/cpsor/genre_form_faq_spanish.html)))

“Preguntas frecuentes (FAQ) sobre los términos género/forma de la Library of Congress (LC)” ([http://www.loc.gov/catdir/cpsor/genre\\_form\\_faq\\_spanish.pdf](http://www.loc.gov/catdir/cpsor/genre_form_faq_spanish.pdf)).

**September 14:** “Library of Congress Documentation for the RDA (Resource Description and Access) Test: Examples for RDA - Compared to AACR2”  
(<http://www.loc.gov/catdir/cpsorDAtest/rdaexamples.html>)

“Name Authority Records” (“RDA Authority Records”  
(<http://www.loc.gov/catdir/cpsorDAtest/nars.doc>))

“Books” (<http://www.loc.gov/catdir/cpsorDAtest/books.doc>)

“Language of Expression -- Multiple Languages”  
<http://www.loc.gov/catdir/cpsor/rdatest/language.doc>

“Legal Works” <http://www.loc.gov/catdir/cpsor/rdatest/legal.doc>

“Publication, distribution, and/or manufacturer statement” - “Publication, Distribution, Etc., Statement” <http://www.loc.gov/catdir/cpsor/rdatest/publication.doc>

“Replacement of GMD Elements; Carrier Description”  
<http://www.loc.gov/catdir/cpsor/rdatest/gmd.doc>

“Statement of Responsibility”  
<http://www.loc.gov/catdir/cpsor/rdatest/responsibility.doc>

**September 23:** “Library of Congress Documentation for the RDA (Resource Description and Access) Test: Frequently Asked Questions”  
<http://www.loc.gov/catdir/cpsor/rdatest/rdafaq.html>

**September 29:** “Assigning Institution Codes and Record identifiers” (Word document)  
 “Library of Congress Documentation for the RDA (Resource Description and Access) Test” <http://www.loc.gov/catdir/cpsor/rdatest/rdatest.html>

“Authority record: MARC to RDA -- LC core elements (including new separate fields\* for those elements although separate fields are not core). Training document #7”  
<http://www.loc.gov/catdir/cpsor/rdatest/training2word10.doc>;

“US RDA Test Policy for the Extra Set: Use of Existing Authority and Bibliographic Records - “Revised document ‘US RDA Test Policy for the Extra Set: Use of Existing Authority and Bibliographic Records””  
<http://www.loc.gov/catdir/cpsor/rdatest/admindoc1.doc>

“USA Test Common set criteria”  
<http://www.loc.gov/catdir/cpsor/rdatest/admindoc3.xlsx>

**September 30:** “Common Original Set and Common Copy Set surrogates” - “Common Original and Common Copy Sets” (“Common Original and Common Copy Sets”)  
<http://www.loc.gov/catdir/cpsor/rdatest/commonsets.pdf>

“Instructions for Common Original Set and Common Copy Set surrogates”  
<http://www.loc.gov/catdir/cpsor/rdatest/commonsetsinstructions.pdf>

**Other LC Web pages.**

**March:** “RDA Train-the-Trainer Webcasts <http://www.loc.gov/bibliographic-future/rda/trainthetrainer.html>), filmed March 1, 2010: ‘Module 6: Identifying Families”  
 “Guidelines for use of \$w, \$x, and \$3 in 260, 490, and 8XX fields” (in conjunction with OCLC, COIN) <http://www.loc.gov/catdir/cpsor/punctuation.pdf>

**April:** “Reconsidering the Cataloging Treatment of Reproductions. April 29, 2010”  
<http://www.loc.gov/acq/conser/reproductions.pdf>

**June:** A test version of the new enhanced version of *Classification Web* was made available at <http://209.18.108.38/Auto/>

**July 15:** “LC to Implement BIBCO Standard Record for Textual Monographs” (“2. LC Implementation of the BSR for Textual Monographs”  
<http://www.loc.gov/catdir/cpsor/lcbsr.html>)

“Textual Monograph MAP (Supplement for LC Catalogers)” (“LC BSR for Textual Monographs; Based on the PCC BIBCO Standard Record for Textual Monographs Metadata Application Profile” <http://www.loc.gov/catdir/cpsor/lcbsrmap.pdf>)

**August:** “FAQ – LC/NACO AACR2 Practice for Creating NARs for Persons Who Use

Pseudonyms” (<http://www.loc.gov/catdir/cps/pseud.pdf>)

### **Publications.**

**November:** “Policy and Standards Division Annual Report FY 2009

(<http://www.loc.gov/catdir/cps/annrepps09.pdf>)

**January:** Valerie Mwalilino created the following procedural documents that are posted on the ABA Workflow and Procedures Documentation website: “Duplicate Materials Exchange Program (DMEP) Overview” ([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Overview\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Overview_F.pdf))

“Canceling a Duplicate Materials Exchange Program (DMEP) Partner “  
([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Cancel\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Cancel_F.pdf))

“Dual Exchange Arrangements for Individual Institutions”  
([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Dual%20Exchanges\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Dual%20Exchanges_F.pdf))

“Duplicate Materials Exchange Program (DMEP) Quotas”  
([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Quotas\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Quotas_F.pdf));

“Establishing New Duplicate Materials Exchange Program (DMEP) Partners”  
([http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Establish%20new%20partners\\_F.pdf](http://www.loc.gov/staff/idt/ABAW-P/ACQ/ACQ-Programs/DMEP%20Establish%20new%20partners_F.pdf))

**March:** “Library of Congress Rule Interpretations (LCRI). Current LCRI”

(<http://www.loc.gov/catdir/cps/currlocri.pdf>).

**June:** LCC: Paul Weiss sent files to CDS for a new edition of class M.

### **Other**

**March:** Descriptive policy specialists discussed proposed changes to the handling of Mongolian names. Kay Guiles and Dave Reser drafted a paper on possible implementation of a new reproductions policy. Dave revised LCRIs 21.3B and 26.2. Paul Weiss continued rewriting the D memos section of the former *Subject Cataloging Manual* and moving the material into new locations in the *Subject Headings Manual* (SCM) or the *Classification and Shelflisting Manual*. He circulated drafts of a new F 560 and a new Appendix F for the SHM for review.

**April:** Ana Cristán finalized documentation to be added to the DCM Z1 quarterly update. She worked with Kay Guiles to successfully deliver those files to CDS. Dave Reser prepared the CDS announcement on additions to name authority records for jurisdictions in 034 fields for geographic coordinates, based on data received from OCLC.

**May:** [LChelp4rda@loc.gov](mailto:LChelp4rda@loc.gov), the new public Help address for the RDA test, was approved. Ana Cristán drafted a FAQ on pseudonyms describing current practices, which were posted on the ABA website in August.

**August:** Libby Dechman prepared an outline for a class she developed on cataloging art, and in anticipation of detailees’ arrival in PSD, she revised a checklist subject specialists have for systematic review of the Subjects Weekly Lists. Janis Young prepared course outlines for teaching history and military and naval science.

## **II. Teaching, Presentations, Meetings, and Consultations**

**October:** Not reported in September 2009: Valerie Mwalilino converted 15 training

scripts and classroom handouts used for her Advanced Fiscal Issues Training into procedural documents for the ABA Workflow and Documentation web site. The range of subjects includes fund management, invoice processing and payments, vendor records, and purchase, order, etc., relating to activities in the ILS acquisitions module. Jolande Goldberg was an invited Poster Presenter at the 2009 Streams of Language, Memory & Lifeways National Conference for Tribal Archives, Libraries & Museums in Portland, Ore. Her presentation concerned on the functionality of *Classification Web* for linking and accessing Web resources, specifically, the primary sources on modern law and government of the sovereign and autonomous indigenous communities in the Americas.

Chief Barbara Tillett and Ana Cristán attended the week-long V Encuentro Internacional de Catalogadores held in Santo Domingo, Dominican Republic. The conference was attended by over 200 catalogers from the Caribbean area, including Dominican Republic, Puerto Rico, Costa Rica, and Guatemala, as well as from Latin America. Barbara was the keynote speaker and presented information on the antecedents, current structure, and future development of cataloging. She talked about how these developments have been affected and informed by the IFLA research on FRBR, FRAD, the development of RDA and the semantic Web. Barbara also participated in a day-long post-conference workshop for approximately 150 catalogers on the details of FRBR and FRAD so that catalogers in the region would have a better grasp of these conceptual models. As an outcome of the workshop, and of an earlier workshop on the same topics held for the National Library of Chile, Ana Cristán worked with Paul Weiss to make the instructional PowerPoint slides and PDF files available on the PSD Web site for anyone who would like to take advantage of training materials in Spanish. Libby Dechman attended the Potomac Technical Processing Librarians annual conference. Janis Young gave an overview of the D schedule to the History and Military Science Section.

**November:** Chief Barbara Tillett gave the introduction at the *LC's Digital Future & You!* presentation by Ronald Murray, "Re-Imagining the Bibliographic Universe: FRBR, Physics and the World Wide Web." Several staff members attended his presentation. Ana Cristán presented an overview of the VIAF at the ABA managers' meeting. Barbara Tillett joined the PCC Policy Committee meeting held at LC, where she and Beacher Wiggins gave a report about the RDA testing. Barbara also spoke about the PCC task group reports on internationalization of authority files and the LCRI review by the PCC LCRI/RDA task force headed by Bob Hiatt. Barbara and Rebecca Guenther (NDMSO) met with Margot Gerritsen (Stanford University) to discuss possible projects for the Stanford graduate students who have been working on visualizations of LCSH. One idea is a demonstration for LC's sesquicentennial memorial for the Civil War, which will begin in 2011. Barbara Tillett and Ana Cristán met with Larry Dixson (NDMSO) to discuss methodology for processing a sample file of Spanish-language subject heading records received from the National Library of Chile. Libby Dechman showed LCSH/SKOS data applications to the subject policy specialists. She attended the ARLIS DC/MD/VA regional meeting. At LC Libby spoke by phone with Henry Potrykus (Dept. of Defense) regarding the LCSH/SKOS project. Dave Reser worked with processing staff in the Music and Manuscripts Divisions to consolidate bibliographic records for parts of LC archival collections that are too large to be stored in Voyager. The consolidated records are created and maintained outside of Voyager, and will be harvested for use in

the new XML-based EAD search system in development. Dave met with the TechPol group determining the indexing requirements for “special characters” in newly developed XML-based search and indexing systems. He also conferred with the St. Louis University School of Law Library regarding cataloging expectations for the joint LC/LLMC scanning project for Native American materials in the general collections.

**December:** Chief Barbara Tillett and Libby Dechman, with Ed Summers from OSI, participated in an advisory board conference call for the HIVE project (Helping Interdisciplinary Vocabulary Engineering) at the University of North Carolina School of Library and Information Studies, Metadata Research Center (Jane Greenberg). Kay Guiles, Judy Kuhagen, and Gerry Ostrove attended a meeting of the LC MARC review group. Dave Reser met with ABA Managers to discuss implementation issues related to the PCC BIBCO Standard Record for textual monographs and the impacts on LC staff and workflows. He met with representatives from The Catholic University of America and the LC Flickr team to discuss possible evaluation projects related to the LC Flickr Project they had proposed. Dave also met with group of TechPol and CS staff to develop a plan for producing MARC records representing EAD collections that are too large to be updated in Voyager. And he met with the Gustman Group (contractors to TechPol) to discuss workflow practices in PSD, system support, and future needs.

**January:** Chief Barbara Tillett gave a presentation, “RDA Changes from AACR2 for Texts,” in the LC’s Digital Future & You! series. The talk is available as a Webcast at [http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4863](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4863). Barbara and Judy Kuhagen conducted a one-day workshop in Boston for participants in the US RDA test. Libby Dechman met with six art catalogers to discuss an art heading on the Weekly Tentative LC Subject Headings list. Dave Reser consulted with OCLC on the first set of records containing characters outside of the MARC-8 repertoire of UTF-8 converted by the new software put in place by DS to produce a lossless conversion of characters.

**ALA midwinter.** Several policy specialists attended the ALA midwinter meeting in Boston. Barbara Tillett attended the CC:DA meeting, the RDA test with vendors, the live demonstration of RDA, and a meeting about the RDA test with participants. Ana Cristán presented the PSD update at the meeting of the PCC trainers. She also attended the CONSER/BIBCO and SACO meetings and the meeting of the ACCTS-CCS RDA planning and training task force. Patricia Hayward demonstrated *Classification Web* at the LC exhibit, including enhancements that are planned. The enhancements will be adding the name authority file, a whole new series of correlations, such as LC class number to NLM class number, and giving the product a fresher look. Bruce Johnson participated in discussions with ALA about RDA and Cataloger’s Desktop. Judy Kuhagen attended the meetings for vendors and for participants in the US RDA test, the CC:DA meeting, and the MARBI meetings. Dave Reser participated in the meeting of the PCC Standing Committee on Standards and MARBI. Janis Young presented reports from LC to the Authority Control Interest Group, to the Subject Analysis Committee (SAC), to SAC’s Genre/Form Implementation Subcommittee, and to OLAC’s Cataloging Policy Committee. She sent a written LC report to the OLAC membership meeting, which she was unable to attend because of a schedule conflict. She gave the PSD report at the SACO meeting. She also attended the CIP Advisory Group and the Cataloging Norms Interest Group. At the SAC meeting Janis gave a report, “Where is LC headed with LCSH?”, an update on the 2007 report, “Library of

Congress Subject Headings: Pre- vs. Post-Coordination and Related Issues.” Janis also gave a 30-minute presentation entitled “Developments in LC subject analysis” in the LC exhibit booth.

**February:** Libby Dechman presented an overview of the G-GE schedules to nine people in the USGEN division. Gerry Ostrove met with Laura Yust (Music) to discuss shelflisting certain special collections in the Music Division. Dave Reser coordinated and led a conference call of NACO node representatives and other interested stakeholders. Chief Barbara Tillett participated and Ana Cristán, Judy Kuhagen, and others audited the call. All participants agreed to the testing, implementation, and exchange of RDA authority elements in order to support the RDA test. Dave attended a meeting with representatives from the Law Library Microform Consortium (LLMC), CAL, and the Asian Division related to possible future scanning projects that may have LLMC or National Diet Library implications. Janis Young presented an hour-long overview of the PN schedules to catalogers from the Literature Section and others.

**March:** Chief Barbara Tillett gave another presentation in the “LC’s Digital Future & You!” series, “RDA: Looking to the Future.” Barbara, Judy Kuhagen and Dave Reser met with P&P staff and a representative from the Folger Shakespeare Library to discuss the implications of RDA for the DCRM(G) standard being revised. Barbara, Dave, and Bob Hiatt met with ASME staff to discuss BFM issues related to the recently adopted changes to the Korean romanization tables. Ana Cristán travelled to Mexico to present a three-day NACO workshop at the Benemerita Universidad de Puebla, in Puebla, Mexico. While there she visited the Universidad Nacional Autónoma de México and the Universidad Iberoamericana in Mexico City to help them plan for a NACO funnel for regional libraries. Libby Dechman began offering office hours in LM531 every other Thursday, 10:00-12:00, so that catalogers in the Bibliographic Access divisions could consult with her easily, on a walk-in basis. Four people did that on the inaugural day. Gerry Ostrove attended the Music Library Association annual meeting in San Diego, where she conducted a meeting of the Archives Joint Committee, which she chairs, and attended the Subject Access Subcommittee business meeting, where as LC liaison she presented a report from PSD. She also attended the joint meeting of the MLA Genre/Form Task Force and the LC Music Genre/Form Project Group, whose agenda she had planned with the Task Force’s chair. Gerry co-chaired a meeting of the fund raising committee for a named travel award under the auspices of the US Branch of the International Association of Music Libraries (IAML-US) and attended the annual business meeting of IAML-US. She also attended sessions on FRBR and FRAD, workflow design for metadata creation, RDA, the Bibliographic Control Committee Town Hall Meeting, collecting oral histories, and MLA’s annual business meeting. Dave Reser provided an analysis of bibliographic records submitted to FLICC/FEDLINK by several contract cataloging agencies responding to a FEDLINK RFP. He generated reports from the CDS LCSH retro file for Janis Young for all records in LCSH with unevaluated references. Janis gave an hour-long web presentation to cataloging students at the University of Illinois GLIS, focusing on the subject proposal and approval process.

**April:** Chief Barbara Tillett’s presentation, “RDA Changes from AACR2 for Texts,” originally given in the “LC’s Digital Future & You!” series, became available as a webcast at two sites, <http://www.loc.gov/staff/digital-strategy/cybercasts.html> (staff Intranet) and [http://www.loc.gov/today/cyberlc/feature\\_wdesc.php?rec=4863](http://www.loc.gov/today/cyberlc/feature_wdesc.php?rec=4863). The

question and answer period that followed Barbara's talk was also videorecorded. Barbara went to Worcester, Mass. to be keynote speaker at the NETSL (New England Technical Services Librarians) spring conference, where her presentation, "Building Blocks for the Future: Making Controlled Vocabularies Available for the Semantic Web," covered the VIAF, LCSH/SKOS, and the RDA vocabulary registries. (<http://www.nelib.org/netsl/conference/2010/BarbaraTillett-BuildingBlocksForFuture.pdf>). She also travelled to the Biblioteca nacional de España (BNE) in Madrid and the US Embassy there. At the BNE she attended the Intercambio Internacional de Información Catalográfica: Proyectos y Normativa (VIAF y RDA), where she gave two lectures, "VIAF, Building Blocks for the Future: Making Controlled Vocabularies Available for the Semantic Web" (<http://www.bne.es/export/sites/BNWEB1/es/Actividades/ActosCulturales/CicloCitaBN/CitaBN2010/docs/CitaBNE-VIAF-280410-BTillett.ppt>) and "RDA: Resource Description and Access: Overview: History, Principles, Conceptual Models" (<http://www.bne.es/export/sites/BNWEB1/es/Actividades/ActosCulturales/CicloCitaBN/CitaBN2010/docs/CitaBNE-RDA-280410-BTillett.ppt>). Barbara and Libby Dechman travelled to the University of North Carolina (UNC) to attend the HIVE (Helping Interdisciplinary Vocabulary Engineering) Project Advisory Board meeting. While there, both talked to Professor Jane Greenberg's Metadata Research class, and Libby gave a presentation, "Some Ideas for Research: LCSH/SKOS." Libby also joined in the subsequent "Metadata Research Blitz" that included UNC Library staff and visitors from the Research Triangle Park and surrounding libraries, where she spoke on the importance of reporting research. Libby also gave two sessions of an overview of classes G-GE to staff in the Germanic and Slavic Division. Libby Dechman held 3 regular bi-weekly office-hour sessions for cataloging staff in LM531. Four staff members visited each time. Kay Guiles and Dave Reser met with ILS, ABA, and BCCD staff to design a project to use the ILS "Pick & Scan" utility to update item records for materials flowing through BCCD in order to improve the tracking of items. Dave met with the product manager from eBrary and other LC staff to view e-book options provided by the vendor. He met with TechPol staff to discuss the extraction of holdings data from the ILS for transfer to the XML datastore, and he worked with Larry Dixon (NDMSO) to begin testing new ILS preprocessing routines for NACO contributed records that will contain RDA elements. Janis Young attended the Children's Literature Section's technical meeting. She met with Business Enterprises staff to explore and discuss the new print products that will result from splitting LCGFT from LCSH. And she had a telephone meeting with Danny Joudrey, SAC chair, to discuss the possibility of SAC sponsoring a genre/form preconference.

**May:** Chief Barbara Tillett visited Brigham Young University in the capacity of "Visiting Scholar." During Libby Dechman's regular bi-weekly office hours in LM531 she met with two people on the first occasion and six on the second. Jolande Goldberg gave a presentation to the Law Librarian and Law Library reference staff on the prospects for a classification-based law portal for indigenous peoples, and invited their comments. At a meeting of the American Bar Association Committee on the Law Library of Congress Jolande give a report on the status and functionality of LC law classification, including the development of such a portal. Judy Kuhagen and Dave Reser attended the two-day CONSER/BIBCO Operations Committee meetings. Dave gave a presentation there on

LC's recent reproductions paper, "Reconsidering the Cataloging Treatment of Reproductions. April 29, 2010" (<http://www.loc.gov/acq/conser/reproductions.pdf>). Judy, Kay Guiles, and Gerry Ostrove attended the meeting of the LC MARC Review Group. Dave attended a two-day forum sponsored by the Copyright Office for publishers on mandatory e-deposit of serials issued only electronically. He attended a conference call with ABA and FLICC/FEDLINK staff, representatives from Serials Solutions, and the senior lawyer from ProQuest on proposed changes to LC's license with Serials Solutions. Janis Young attended a Children's Literature Section technical meeting. Janis, with Jurretta Heckscher and Kurt Maier, gave a webinar for library science students at the University of Malta. Janis discussed the process of proposing and approving subject headings. Janis gave a book-in-hand workshop to the catalogers in the History and Military Science Section on classifying works in U and V, with an emphasis on materials published by the Rand Corp.

**June:** Chief Barbara Tillett and Janis Young attended the American Theological Library Association Conference in Louisville, Ky. Barbara gave two talks about RDA and Janis gave the kickoff presentation for the religion genre/form project, for which ATLA is partnering with PSD. During Libby Dechman's bi-weekly office hours in LM531, she had three visitors on the first occasion and six on the second. Jolande Goldberg was invited to participate in the conference of the International Council for Scientific and Technical Information in Helsinki, where she gave a report on her current work, the exploration of new strategies employing LC classification to access data on the Web that is otherwise dispersed and hard to obtain. She then travelled to Hamburg to visit the Bucerius Law School at the University of Hamburg. She met with officials there and addressed a group of foreign PhD students. She also met with the Library director of the Max Planck Institute for Foreign and Comparative Law to discuss the Institute's cooperation with LC in a digital project for a virtual collection of the Haitian legal patrimony. As a member of the Law Library of Congress planning committee on a Web law portal, Jolande participated in a meeting of the National Congress of American Indians (NCAI) to discuss how NCAI could cooperate in the development of such a portal. Dave Reser met with ABA staff and representatives of EZB and Serials Solutions to discuss opportunities for future collaboration, and with staff working on the e-deposit of e-serials to discuss holdings records in the ILS. He met with Ardie Bausenbach (ILSPO) to discuss keyword indexing changes related to RDA elements, and he wrote a CDS announcement regarding the implementation schedule of new MARC elements and testing of new MARC elements in authority records. Dave gave a presentation to the LS Digital Library Working Group regarding linking to digitized content from the LC ILS and issues related to OpenURL implementation. Janis Young gave two sessions of cartographic genre/form training for G&M staff. She held another phone meeting with Danny Joudrey, chair of SAC, to discuss ALCTS' application for an ALA genre/form preconference. Janis also attended the Children's Literature Section technical meeting.

Several PSD staff members attended the ALA annual conference in Washington, D.C. Barbara Tillett gave two presentations at the sold-out "RDA 101" pre-conference. She presented the LC report to CC:DA. Ana Cristán presented a PSD update at the PCC regional trainers meeting. She gave a presentation at the IFLA Latin American and Caribbean Section/Reforma joint meeting on accessing the online introductions to FRBR, FRAD, and RDA that PSD has provided in Spanish. Ana also attended the



meeting of the ALCTS-CCS RDA Planning and Training Task Force. Jolande Goldberg presented a program for the American Indian Library Association, a section of ALA, on the structure and functionality of LCC online as a potential means of accessing information on present-day Native American law, environment, and indigenous rights. Among the sessions Judy Kuhagen attended were the CC:DA meeting, the CONSER-At-Large and BIBCO-At-Large meetings, the Heads of Cataloging Departments Interest Group, MARBI, and the Continuing Resources Cataloging Committee. Judy also attended the meeting of the US RDA Test participants. Gerry Ostrove gave a presentation, "The Music Genre/Form Project: Issues and Some Solutions," at the ACIG (Authority Control Interest Group) program session, "Authorized Genre, Forms and Facets in RDA." Afterwards, she met with Jenn Riley, another of the presenters on that session, and Beth Iseminger, chair of the Music Library Association genre/form task force, to discuss issues related to the music project. Gerry also attended CC:DA, ALCTS, MARBI, and SAC sessions. Dave Reser made presentations at several sessions related to the US RDA test. Janis Young gave a presentation, "The Library of Congress' Genre/Form Terms: a Faceted System," at the ACIG program session mentioned above. She gave an LC report at the ACIG business meeting and she also reported as LC liaison at the SAC meeting, the Genre/Form Implementation Subcommittee, and the OLAC CAPC meeting. She sent a written PSD report on cartographic genre/form headings to MAGERT and presented the PSD report at the SACO meeting. As LC liaison, she gave a PSD report to the OLAC membership meeting. Janis also attended the CCS executive committee meeting and the ALCTS programming committee meeting to promote the idea of a genre/form preconference. At the LC exhibit booth, Janis presented "Developments in LC Subject and Genre/Form Analysis."

**July:** Ana Cristán attended the SALALM conference held in Providence, R.I., where she presented a paper discussing the Spanish language information on FRBR, FRAD, and RDA that is posted on the PSD home page, and providing a brief overview of the methodology to be used by LC during the US national libraries' testing of RDA. Libby Dechman's bi-weekly office hours in LM531 drew three visitors on the first occasion and six on the second. Valerie Mwalilino and Tim Carlton (COIN) updated the training materials and taught one three-day session of ILS Acquisitions Comprehensive Training to ten ABA librarians and technicians. Jolande Goldberg prepared a report for the AALL Standing Committee on Cataloging and Classification on her current work, emphasizing law genre/form headings. Because she wasn't able to attend the meeting, her report was read by Aaron Kuperman. Jolande was re-elected for another three-year term to the advisory council of the Law Library Microform Consortium-Digital. Gerry Ostrove attended meetings of the RDA music testers to review their practice records. Dave Reser participated in a system stress test for the new XML-based EAD Search System and then suggested improvements related to displays. He also attended an ITS-led requirements gathering session on the needs of external user groups to remotely access LC's systems and servers. In addition, he taught a class on RDA and the treatment of digital resources for the Metadata and Project Management course at the Catholic University of America School of Library and Information Science. See also below, Projects: RDA.

**August:** Chief Barbara Tillett went to Los Angeles for meetings at the Getty Research Institute, where she gave two presentations, “General Overview” of RDA and “Building Blocks for the Future: Making Controlled Vocabularies Available for the Semantic Web.” Barbara travelled to Copenhagen to attend the EURIG (European RDA Interest Group) meeting, where she gave a presentation, “RDA and Plans: Australia, Canada, UK, & US” (<http://www.slainte.org.uk/eurig/docs/RDA2010/TillettEURIG2010.pdf>) and, with Troy Linker from ALA, gave an overview of the RDA Toolkit. From there she went to Göteborg, Sweden for the IFLA meeting. Prior to the IFLA meetings she led the VIAF participants’ group all-day meeting. She is a member of the IFLA Standing Committee of the Classification and Indexing Section, provides MulDiCat for the Cataloging Section, serves on the Working Group on Subject Access for National Bibliographic Agencies helping to complete its report, serves on the FRBR Review Group, which is building a consolidated model that combines FRBR, FRAD, and FRSAD, and serves on the FRBR Aggregates Working Group. In addition to numerous working meetings of those groups, she spoke on VIAF and also attended the ISBD Review Group meeting, the Special Interest Group on Indigenous People’s business meeting, the ICADS (IFLA-CDNL Alliance for Digital Strategies) meeting, and the program on digital repositories. During Libby Dechman’s bi-weekly office hours in LM531 there were four visitors at the first session and five at the second. She corresponded with representatives from Drexel University in conjunction with a project to enhance vocabularies and classification systems in the STEM (science, technology, engineering, & mathematics) area. She drafted a revision of SHM H 1678 Interviews. Jolande Goldberg is a member of the BEAT committee, and she attended a committee meeting of that group. Janis Young met with Andrea Leigh (MBRS) to plan the three-hour class on genre/form headings they will present at the Association of Moving Image Archivists preconference in November. Janis gave a two-hour long hands-on course to the History and Military Science Section on cataloging works that classify in U and V. She also attended the Children’s Literature Section technical meeting. Janis began holding office hours in the Madison Building for cataloging staff, which she did twice, helping a total of four catalogers.

**September:** Chief Barbara Tillett and Ana Cristán travelled to Lima, Peru to attend and give presentations at the III Congreso Internacional de Bibliotecología e Información. Barbara’s talk was “Catalogación: Recursos, Descripción y Acceso; Cambios y Desafíos.” Ana’s talk was “Library of Congress: Programas de cooperación, Recursos, Descripción y Acceso,” Ana also conducted an authorities workshop lasting a day-and-a-half at the National Library of Peru, and she spent a half day at the Pontificia Universidad Católica del Peru providing follow-up support to the new NACO funnel members from Peru. They were able to attend the inauguration of the new Director of the National Library of Peru. Libby Dechman attended the ONIX and CIP Digital Futures program. She replied via email to a request from the Bibliotheca Alexandria for information about participation in the multilingual versions of the LCSH/SKOS project, and she sent them a summary of that project so far (“Multi-Lingual LCSH Linked Data Project”). Libby circulated to her wide cataloging email distribution list a schedule of her office hours in LM531 through the end of the calendar year, and at the three sessions for the month spoke with six visitors. Jolande Goldberg, a member of the BEAT committee, attended a committee meeting. Gerry Ostrove attended an RDA LC music

testers meeting. See also below, Projects: RDA Test. Janis Young held office hours in the Madison Building once, helping one cataloger with several issues and questions. Janis also attended the Children's literature Section's technical meeting.

### **III. Projects**

#### **Acquisitions.**

**March:** Valerie Mwalilino has been chair of the Acquisitions Fiscal Issues Group since 2009. This month, a website on the ABA Intranet of the group's activities was established, along with the other ABA Workflow and Procedures Advisory Groups. Valerie submits meeting notes and other information to the site,

(<http://www.loc.gov/staff/aba/committees/wpa/afig/index.html>).

**May:** Valerie Mwalilino helped to create and recently updated the spreadsheets listing "Acquisitions Country Responsibilities: Contacts by Division, Section and Country," which are posted on the ABA Intranet website

(<http://www.loc.gov/staff/aba/source/CountryRespDivSectAcqSpec.060110.final.xls>).

**June:** Valerie Mwalilino created a procedural document describing the approved methods to dispose of materials that are not selected for the Library's collections.

"Discards" is posted on the ABA Workflow and Procedures Documentation website ([http://www.loc.gov/staff/abt/ABAW-P/ACQ/ACQ-RecProc/Discards\\_F.pdf](http://www.loc.gov/staff/abt/ABAW-P/ACQ/ACQ-RecProc/Discards_F.pdf)).

#### **BCCD problem book review.**

**December:** Mary Kay Pietris continued to review problem books in BCCD. She investigated 534 books from the mass deacidification program, solving the problems in 142 instances; the remaining books were turned over to a CALM staff member for solution.

#### **Civil War subject headings.**

**February and March.** In anticipation of the Sesquicentennial celebrations of the Civil War, Janis Young enhanced over 200 subject authority records for Civil War battles with the classification number for the battle. The project also involved adjusting dozens of captions and notes in the classification schedule for the war.

#### **Collection level records.**

**December:** Dave Reser completed collection level records for three new LC digital archive collections: Iraq War, Legal Blogs, and U.S. Supreme Court nominations. He drafted a CDS notice to subscribers about the project to seed CONSER records with ISSN-L subfields.

#### **Cookery subject headings.**

**May:** Libby Dechman completed the bulk of the **Cookery-to-Cooking** proposals.

**June:** Libby Dechman's subject proposals for the change from **Cookery** to **Cooking** appeared on a very large Weekly List 22. She drafted a revision of SHM H 1475 Cooking and Cookbooks, which was posted for comment on the PSD Web site.

#### **Copyright.**

### **Copyright paperback collection.**

**March:** Dave Reser began working on a project to clean up a file of bibliographic records representing the Copyright Paperback Collection received from OCLC, and prepared them for loading to the ILS.

### **Copyright backlog detail.**

**January 19-March 19, 2010:** Paul Sayers served on a special Copyright Detail to help reduce the Copyright application process arrearage.

### **Mandatory deposit.**

**January:** Dave Reser began collaborating on a new project, initiating copyright mandatory deposit demands

### **Digitization projects.**

**May:** Dave Reser met with Gustman Group consultants engaged by the library to develop specifications for LC's future digital repository needs. He met with Collections Services staff to discuss projects involving microfilm reels of telephone directories to be scanned by the Internet Archive.

**August:** Working with the Law Library Microform Consortium-Digital, Jolande Goldberg spearheaded a project to digitize Haiti materials. Those at LC have been processed and scanned. Other participating institutions so far are Columbia University, the Universities of Florida and Michigan, and Washington University in St. Louis.

### **eCIPs.**

**March:** Libby Dechman attended an organizational meeting for a new project, to review American Mathematical Society subject headings in eCIPs.

### **Fort Meade tour.**

**April:** A group of staff members took a tour of the Fort Meade storage facility led by Steve Herman, chief of CALM. A repeat session was arranged to enable more staff to visit.

### **Genre/Form implementation.**

#### **Cartographic.**

**March:** Janis Young met with staff from G&M to discuss cartographic genre/form headings.

**April:** Janis Young finished creating cartographic genre/form authority records, and they were scheduled for a weekly list.

**May:** Janis Young gave a two-hour training presentation on cartographic genre/form headings to G&M catalogers. Approximately 65 genre/form heading proposals for cartographic materials were approved.

**August.** LCSH form subdivisions that include the word "maps" were revised.

**September.** Genre/form headings for cartographic materials were implemented at LC.

#### **Law.**

**March:** Janis met with LC law catalogers and Law Library staff to discuss the law genre/form thesaurus presented to PSD by the American Association of Law Libraries (AALL). She sent comments on the law genre/form thesaurus to AALL.

**April-May:** Jolande Goldberg and Janis met, sometimes together and sometimes

separately, with catalogers from the Hebraica and Law sections and others to discuss genre/form headings for Jewish law. Jolande also met with Allen Maberry and the Islamic law team to work on terms and related issues.

**September:** Proposals for law genre/form headings were prepared for formal approval on a weekly list in November.

#### **Literature.**

**December:** Dave Reser produced reports from the CDS LCSH retro file for Janis Young regarding literature genres. This phase is to begin in FY11.

#### **Moving images.**

**March:** Janis met with staff from MBRS to talk about hierarchies for the moving image headings.

#### **Music.**

**November-June** Gerry Ostrove met with LC's music genre/form project group, which she heads.

**March:** While attending the Music Library Association (MLA) annual meeting in San Diego, Gerry Ostrove met with the MLA genre/form task force. She also met privately with the task force chair and the chair of MLA's bibliographic control committee to discuss the music project.

**May:** Bruce Johnson joined the LC music genre/form project team and met with Gerry Ostrove to discuss their work.

**June:** Gerry Ostrove sent three new documents from the group to the MLA Genre/Form Task Force, "Genre/Form Headings Based on Text Incipits or Titles of Texts;" "Key to Terms in the (New) Status Column, Genre/Form Master Web List," the introduction to the updated version of that list that is being prepared for the PSD genre/form Web site; and "Proposed Genre/Form Thesaurus Terms: Questions to Resolve. June 11, 2010."

#### **Religion.**

**March:** Janis Young participated in a conference call with staff at American Theological Library Association to plan for the religion genre/form project kickoff presentation.

**June:** Janis Young gave the kickoff presentation for the religion project at the American Theological Library Association meeting.

#### **Geographic coordinates.**

**December:** Dave Reser met with Policy, TechPol, and G&M staff to discuss policies and practices for adding geographic coordinates to name authority records, including development of a list of source codes for use with MARC field 034 (geographic coordinates). These coordinates were added during the fiscal year. Exploration continues to add coordinates to subject authority records, using data from OCLC.

#### **Human Rights Day.**

**July:** Jolande Goldberg began serving on a Law Library of Congress committee to develop a program for LC's celebration of Human Rights Day.

#### **ISBD consolidated.**

**July:** Judy Kuhagen wrote the LC response to the draft revision of the consolidated edition of the ISBD.

### **Korean book vendor records.**

**July:** Dave Reser collaborated with Youngsim Leigh (ASME) on the development of protocols for using MARCEdit software to create MARC IBC records from Microsoft Excel spreadsheets provided by LC's largest Korean book vendor.

### **Law classification.**

**September:** Jolande Goldberg completed the draft schedule on indigenous law for the Canadian First Nations, Inuit, and Métis. These complete the three sections of the Law of Indigenous Peoples in the Americas, KIA Arctic and sub-Arctic Regions, KIB-KID Canada, and KIE-KIK United States.

### **Law Internet portal.**

**July:** Jolande Goldberg continued to work with the LC Law Librarian's team to create an Internet portal for laws of indigenous peoples, which will be named "Sovereigns within a Sovereign." She attended a meeting with Beacher Wiggins, Barbara Tillett, the Law Librarian, and Law Library staff to consider ramifications of such a portal within the Law Library's new environment.

### **LCSH in SKOS.**

**January:** Libby wrote a statement about LCSH/SKOS on LC's Authorities & Vocabularies service for Beacher Wiggins to deliver at the meeting later in the month of the Oslo (Norway) Knowledge Organization Seminar.

**May:** Libby Dechman began a new project to create links to LCSH/SKOS for the headings in *Répertoire des vedettes-matière* and Spanish subject heading records.

**June:** Libby Dechman wrote a report for Beacher Wiggins on LCSH/SKOS uses and users.

**July-August:** Chief Barbara Tillett, Ana Cristán, Libby Dechman, and Loche McLean met several times with members of NDMSO and Beacher Wiggins to discuss the processing of subject files sent to LC by the Biblioteca Nacional de Chile, the Biblioteca Nacional de España, and the Université Laval, and how best to incorporate these files into SKOS or have linking fields generated that would enable users to match terms across languages.

### **LC/XML datastore.**

**December:** Dave Reser began working on a new project to develop functional requirements for searching an LC database with a central unified index (the proposed LC XML datastore).

### **MARC records for EAD cataloging.**

**October:** Dave Reser met with group of TechPol and CS staff to develop a plan for producing MARC records representing EAD collections that are too large to be updated in Voyager.

### **Non-Latin script cataloging.**

**October:** Dave Reser coordinated the LC response to the draft report of the PCC Task Force on Non-Latin Script Cataloging Documentation.

**Obsolete language codes.**

**December:** Dave Reser worked with ILSPO to identify bibliographic records with obsolete language codes, and forwarded the records to the Data Integrity Section for correction via BatchCat.

**OCLC 040 code flip.**

**December:** Dave Reser analyzed a project to flip the “LNN” holdings symbol in OCLC to the “DLC” value proposed by FLICC/FEDLINK; he then monitored the progress of the actual flip.

**PCC.**

**May:** Dave Reser and Barbara Tillett attended a meeting with ABA, BE, and TechPol staff and representatives from SkyRiver and Innovative Interfaces to discuss their request to become a NACO node. These discussions also covered other implications for the PCC programs regarding SkyRiver participation. During the remainder of the year, PSD assisted with the formalization of adding SkyRiver as a new NACO node.

**PSD email accounts.**

**May:** As part of the migration from GroupWise to Outlook Dave, Reser set up access to the PSD “policy,” “dbiu,” and “LChelp4rda” accounts for appropriate PSD staff.

**RDA.**

**November:** Descriptive policy specialists attended an online demonstration from the ALA publishing office of the beta version of RDA and of Bugzilla, the proofreading reporting and correction system for the RDA draft.

**December:** Barbara Tillett, Judy Kuhagen, and Dave Reser met with Ex Libris regarding RDA and the impact on local systems. Barbara and the descriptive specialists, Ana Cristán, Bob Hiatt, Gerry Ostrove, Dave Reser, and Judy Kuhagen continued proofreading of their respective assigned sections of the RDA draft.

**January:** Descriptive specialists continued proofreading the RDA draft.

**March:** Descriptive policy specialists participated in another round of proofreading of the RDA text in preparation for the approaching release of the new standard. Several descriptive policy specialists attended one of the webinar sessions on the RDA toolkit conducted by ALA Publishing.

**May:** Bruce Johnson worked on adding RDA and LCPSs to Cataloger’s Desktop and provided directions for policy specialists and testers to log on to the staging server so they could try things out as development progresses.

**June:** Descriptive specialists did the final round of proofreading of the text. They viewed an RDA webinar, “Making the Most of the RDA Toolkit Open-Access Period,” given by the ALA Digital Reference Publisher, Troy Linker. Barbara Tillett, Judy Kuhagen, and Susan Morris met with Christine Frodl from the Deutsche Nationalbibliothek to discuss RDA and the US RDA Test.

**August:** Judy Kuhagen wrote the follow-up LC response to the JSC on deferred RDA issues.

## **RDA test.**

**October-November:** Judy Kuhagen worked on documents related to the RDA Test; she met with ABAMT and the RDA Test Coordinating Committee to discuss those documents and received approval from ABA management to proceed.

**December:** Barbara Tillett, Judy Kuhagen, and Beacher Wiggins met with LC catalogers who will be participants in the 2010 US RDA test to give them an overview of that test. Barbara, Dave, and Judy also met with ILS staff and others from PSD to discuss plans for the test. Judy attended meetings of the ABA Management Team to discuss MARC encoding changes for the RDA test and she prepared training materials for the one-day RDA Test “Train the Trainer” workshop in January in Boston. The descriptive policy specialists wrote and reviewed revisions of LCRI content for the RDA Test.

**February:** Judy Kuhagen met with RDA testers from the ABA divisions and other LC processing units at LC. She completed final review of *Library of Congress Policy Statements* (successor to LCRI's) for the LC participants in the US RDA Test.

**March:** Judy attended meetings of the US RDA Test Coordinating Committee.

**April:** Judy Kuhagen met weekly with the US RDA Test lead testers from the ABA divisions to review their RDA practice bibliographic and authority records. She created and revised examples of AACR2 and RDA records for posting on the US RDA Test LC documentation site. Descriptive specialists attended RDA training sessions for lead testers.

**May:** Judy Kuhagen prepared training materials for June training sessions for LC participants in the US RDA Test and she updated documents posted on the LC site for RDA Test documentation. Judy also attended meetings of the US RDA Test Coordinating Committee.

**June:** Judy Kuhagen gave classes in the LC-centric version of US RDA Test training materials to LC's testers, staff from COIN, and staff from PSD. Each class consisted of two half-day sessions, which she presented four times. Judy also gave a presentation on RDA at an Air Force, Navy, and USMC Librarians Training Workshop. Judy met with David Williamson to discuss RDA-related changes to his ONIX and TCEC programs for the LC testers. With Beacher Wiggins and Susan Morris, Barbara Tillett, and Judy Kuhagen, gave an RDA and US RDA Test briefing to Deanna Marcum. Judy also attended a meeting of the US RDA Test Coordinating Committee.

**July;** Judy Kuhagen gave RDA training to MBRS staff at Culpeper consisting of two half-day sessions for LC participants in the US RDA Test. She attended a meeting of the US RDA Test Coordinating Committee for whom she created common copy set examples for that meeting. Judy gave a demonstration of the RDA Toolkit at an ABAMT meeting; and conducted eleven three-hour discussions of RDA practice records created by LC testers with groups of those testers by category of resources cataloged (serials, music, etc.). She prepared the script for an RDA Toolkit demonstration at the August 8 workshop of the European RDA Interest Group, which was meeting in Denmark. Judy also reviewed approximately 375 practice records created by LC testers, PSD descriptive policy specialists, and COIN staff, and she answered 30 messages sent to the [LChelp4rda@loc.gov](mailto:LChelp4rda@loc.gov) account from catalogers inside and outside LC.

**August:** Ana Cristán, Judy Kuhagen, and Dave Reser led practice record discussions with LC participants in the US RDA Test. Judy wrote and revised documents related to



the US RDA Test. Judy responded to 44 requests in the LChelp4rda email account and Dave replied to more than 20.

**September:** Judy Kuhagen updated various policy and training documents. She reviewed all of the Library of Congress Policy Statements (LCPS; RDA counterpart to the Library of Congress Rule Interpretations) and tested the functionality of the file for ALA Publishing in a staging site for an update to the RDA Toolkit. Judy and Dave Reser then submitted corrections and revisions to ALA. Judy created five made-up surrogates and bibliographic records for the common copy set of resources to be cataloged during the test. Dave and Susan Morris gave two presentations of a session for LC testers in the Mary Pickford Theater to talk about surveys, macros, and templates. Some descriptive specialists also attended. Judy met with LC testers from G&M, Music and MBRS (she went to Culpeper), divisions outside ABA that are participating in the LC test. With Les Hawkins, she moderated an Elluminate session with CONSER testers from LC and other participating libraries. Judy and Dave sent 83 responses from the [LChelp4rda@loc.gov](mailto:LChelp4rda@loc.gov) email account.

#### **Schatz libretto collection.**

**December:** Dave Reser met with Morgan Cundiff and Robin Rausch of the Music Division to discuss a new project to massage and load 12,000 bibliographic records for LC's Schatz libretto collection created by the University of Virginia.

**April:** Dave Reser began meeting with Joe Bartl (Music) to discuss the bibliographic records being acquired from the University of Virginia, including those that have been converted and any additional requirements.

**SCM:D.** In his revision and dissolution of the D manual, *General Cataloging Procedures*, of the former *Subject Cataloging Manual*, Paul Weiss circulated several drafts of instruction sheets as revised for the *Classification and Shelving Manual* and the *Subject Headings Manual*. Obsolete D instruction sheets will be cancelled.

#### **Social tagging.**

**December:** Barbara Tillett attended a meeting with Ingrid Hseih-Yee, Beacher Wiggins, and staff from P&P to discuss a potential research project regarding social tagging for images. In further explorations into potential projects to test social tagging, she discussed with Michelle Springer her lessons learned from Flickr and other projects at LC.

#### **Subject cataloging training for cataloging staff.**

**May:** Tom Yee, Libby Dechman, and Janis Young began formal work on the subject training plan PSD agreed on with COIN and will develop and implement.

**June:** Subject policy specialists attended two meetings with COIN staff on the development of a curriculum for training in subject analysis, LCSH, and assignment of subject headings.

**August:** Libby, Tom, and Janis met twice more, continuing to develop a curriculum for training cataloging staff in subject analysis, LCSH, and assignment of subject headings. Libby prepared a questionnaire that will be circulated to cataloging staff to solicit their assistance. The plan was approved by the ABA management team in September.

**Subjects.**

**October:** Libby Dechman revised *Subject Headings Manual* H 405 for cemeteries. Also see initiatives for Cookery and Genre/Form Thesaurus.

**University of Michigan Alternate Spring Break interns.**

**February:** Libby Dechman made preparations for the March visit to LC of several library school students from a group of University of Michigan Alternate Spring Break interns who worked in the Washington area for a week. Three students worked in PSD. The preparations were elaborate, and a variety of instructions about their LC visit were necessary.

**March:** Among Michigan School of Information interns assigned to LC during this week-long activity, three were in PSD, two assisting Libby Dechman and one assisting Gerry Ostrove. Libby's interns worked on two projects: the 072 project to identify terms in pattern headings for application of the 072 field in authority records, and the second the massive Cookery project to change that heading to Cooking. Gerry's intern worked on the 053 project to add biography classification numbers from the ML410-ML429 span of LCC to the 053 field in name authority records for individuals and performance groups about whom we have books classified in those numbers. There were opening and closing ceremonies for the interns that staff mentors attended.

**Unprocessed serials.**

**February:** Paul Sayers began an overtime project in the U.S. General Division to work on unprocessed serials.

**Veteran's History Project.**

**April:** Paul Sayers prepared contents notes for the Web records for Jesse A. Beazley, Ward B. Chamberlin, Jr., and Charles Henry Neighbor.

**May:** Paul created contents notes for the Web records for Thomas Blakey and Charles D. Mason.

**July:** Paul prepared contents notes for the Web entries for William Brooks Allen, William A. Foley, Jr., Severo K. Guerrero, James H. Langford and Joseph Shimko.

**August:** Paul wrote contents notes for the Web records for John L. Cockburn, Gilmon Brooks, Kenneth E. Bramlett, Jesse Gibbs, Herb L. Hammond, and Donald M. Carlton.

**VIAF.**

**August:** A report of activities in 2010 to date by Ana Cristán appeared in the June 2010 issue (no. 33) of IFLA's *SCATNews*, Newsletter of the Standing Committee of the IFLA Cataloguing Section. Barbara led the VIAF participants' meeting in Sweden. Ana Cristán assisted with reviewing the changes to VIAF beta version and provided feedback and corrections to LC's data.

**Voyager.**

**December:** Dave Reser developed documents for discussion with TechPol divisions and ABA managers with regard to possible scenarios for LC participation in the US RDA Test in Voyager. Dave also submitted new tag tables and other complementary files to

the TechPol division for an early 2010 file update rollout for the Voyager cataloging client.

**January:** Dave met with the ILS OPAC design team to discuss possible reconfigurations related to implementation of new elements for RDA.

**March:** Dave revised the LC ILS tag tables to reflect new MARC changes primarily related to newly-defined RDA elements.

**April:** Dave reviewed and commented on the proposed specifications for enhancements to the global update capabilities for the Voyager system being developed by Ex Libris.

**May:** Dave worked with ILSPO staff to examine the impact of stopwords on keyword searches in the ILS.

#### **Web applications.**

**June:** Dave Reser was appointed to the selection group for Web-scale discovery applications to be purchased by LC in FY 2010.

#### **IV. Ongoing operations.**

The following regular activities that are not reported separately also take place in PSD: publication of the weekly tentative and approved Subject List and Classification List and the Summary of Decisions of the weekly subject and classification editorial meetings; responses to cataloging queries received internally, from U.S. libraries, and internationally; collection inventory project; database maintenance of authority and bibliographic records. A summary of PSD's responsibilities is found at <http://www.loc.gov/catdir/cpsa/queries.html>.

#### **V. Staff.**

##### **Changes, awards, and activities.**

**October:** Two new assistant editors joined the Data Integrity Section after having been appointed in September: Sabreen Madyun from NLS/BPH and Ethel Tillman from P&P.

**January:** Paul Sayers attended the Length of Service Ceremony, where he was recognized for his 25 years at the Library. He began a nine-week re-assignment to a special copyright application arrearage reduction project that has been designated a high priority by Congress and the Librarian. Paul is one of 38 technicians identified by Library Services managers for this SWAT effort.

**February:** Patricia Hayward began a 120-day detail to the CIP program, U.S. and Publisher Liaison Division.

**March:** Paul Sayers completed his assignment to a copyright application arrearage reduction project that had been assigned a high priority by Congress and the Librarian, and returned to PSD.

**April:** Paul Sayers served as a volunteer for Take Our Kids to Work Day.

**June:** Yolanda Proctor began to assist with administrative assignments in the Asian and Middle Eastern Division one day a week.

**July:** Allis Robinson, Data Integrity Section, retired after more than 38 years of devoted service to the Library. Staff members planned to honor her at a luncheon in October.

Ana Cristán, Bob Hiatt, Bruce Johnson, Judy Kuhagen, Gerry Ostrove and Dave Reser received a Group Special Act or Service Award and cash awards for their "efforts from

September 2009 to March 2010 to review the 545 LC Rule Interpretations and the rewriting of the replacement LC Policy Statements.” Judy received special recognition. **August:** Jurij Dobczansky began a not-to-exceed-four-months detail working on subject cataloging policy tasks. Paul Sayers was a volunteer at the National Book Festival. **September:** Marian Johnson, Data Integrity Section, retired after 37 years of devoted service to the Library.

### **Continuing Education.**

**October:** Libby Dechman attended a CENDI/NKOS workshop, “Knowledge Organizations Systems: Managing to the Future,” at the National Agricultural Library. Policy specialists attended various webinars offered onsite: an EAC-CPF (Encoded Archival Context-Corporate Bodies, Persons and Families) webinar on names in archival collections (Barbara Tillett, Dave Reser), a NISO production, “Bibliographic Control Alphabet Soup; AACR to RDA and Evolution of MARC” (Gerry Ostrove, Dave Reser), and OCLC’s “Implementation Plans for RDA” (Barbara Tillett, Judy Kuhagen, Gerry Ostrove, Dave). Several staff members attended the town hall meeting with Deanna Marcum.

**November:** Staff members attended the mandatory LC Library Services Information Session on November 5. Barbara Tillett and other staff members attended a presentation in the NDIIPP briefing series by Herbert Van de Sompel, Los Alamos National Laboratory, and Michael Nelson, Old Dominion University, “Memento: Time Travel for the Web.” Ana Cristán attended a webinar sponsored by CONSER on the repeatable 260 field. She also attended a briefing on the new features in *Cataloger’s Desktop* 3.0 and another of the training sessions in the Web 2.0 series. Gerry Ostrove attended two Outlook training classes.

**December:** Several staff members attended a presentation and demonstration sponsored by the Asian and Middle Eastern Division on transliterators for Chinese, Korean, and Arabic. Use of these saves significant amounts of time for catalogers. Gerry Ostrove attended two Outlook classes.

**January:** Several staff members attended a tour of the recently expanded preservation laboratory. Gerry Ostrove took the Word course on margins, tabs, and indents.

**March:** Several subject policy specialists attended a webinar, “Implications of MARC Tag Usage on Library Metadata Practices” presented by Karen Smith-Yoshimura from OCLC. Several policy specialists attended a two-part webinar sponsored by the National Information Standards Organization, “Identifiers: New Problems, New Solutions” (Part I: What’s in a Name: Latest Developments in Identifiers; Part 2: Content Identification: What’s New). Barbara Tillett and Ana Cristán attended a presentation at LC by Merilee Proffitt that included highlights from the RLG Partnership annual meeting, activities related to the Research Information Management program, the RLG Partners Social Metadata Working Group, the Virtual International Authority File, and the potential of linked data and the preliminary results from the recent survey on special collections and archives. Dave Reser attended several product demonstrations of Web Scale Discovery Systems being evaluated for purchase by LC. He took Outlook basic training.

**April:** Barbara Tillett and Ana Cristán viewed the webinar “Directions in Metadata” by Karen Coyle. Dave Reser attended demonstrations of systems being evaluated by LC as part of the Web Scale Discovery System project.

**May:** Dave Reser took the course, Outlook Power Users.

**June:** Several staff members attended an OCLC webinar, “Transitioning with and beyond MARC.” Libby Dechman attended the NISO webinar, “Control Your Vocabulary: Real-World Applications of Semantic Technology.” Dave Reser attended an all-day training workshop on the MARCEdit Software, with developer Terry Reese.

**July:** Yolanda Proctor completed the Library’s 12-week Career Development Program and attended the graduation ceremony. Several staff members took the course, “Writing for the Web,” which was being offered by COIN on dates in July and August.

**August:** Several more staff members took the course, “Writing for the Web,” which was being offered by COIN on dates in July and August. Paul Sayers attended a Veteran’s History Project staff workshop.

## VI. Visitors

**November:** “Karen Smith-Yoshimura from OCLC visited LC on Nov. 10. During the portion of her visit in PSD, chief Barbara Tillett, Ana Cristán, and Dave Reser met with her. Among the topics discussed were the VIAF, Unicode and issues concerning non-Latin characters in bibliographic records. Yuki Kawano, visiting LC from the National Diet Library in Tokyo, came to PSD on Nov. 13. Gerry Ostrove was her host. She and Gerry discussed several issues having to do with music cataloging, and she met with Janis Young to discuss genre/form headings. Mary Curran (University of Ottawa) visited PSD on Nov. 6 in her capacity as a columnist for *Cataloging & Classification Quarterly* (CCQ). On Nov. 19 Barbara met with Dr. Vortonsov from the Academy of Sciences in Moscow.

**March:** Assistant chief Tom Yee gave a briefing on ABA and PSD to 15 library school students from the École de Bibliothéconomie et des Sciences de l’Information, Université de Montréal. They made a day trip on the bus just to visit LC. Janis Young met with University of Illinois GLIS visiting student Melanie Samples to discuss the subject proposal and approval process.

**April:** Dave Reser met with visiting Syriac scholars from the University of Alabama and Harvard University.

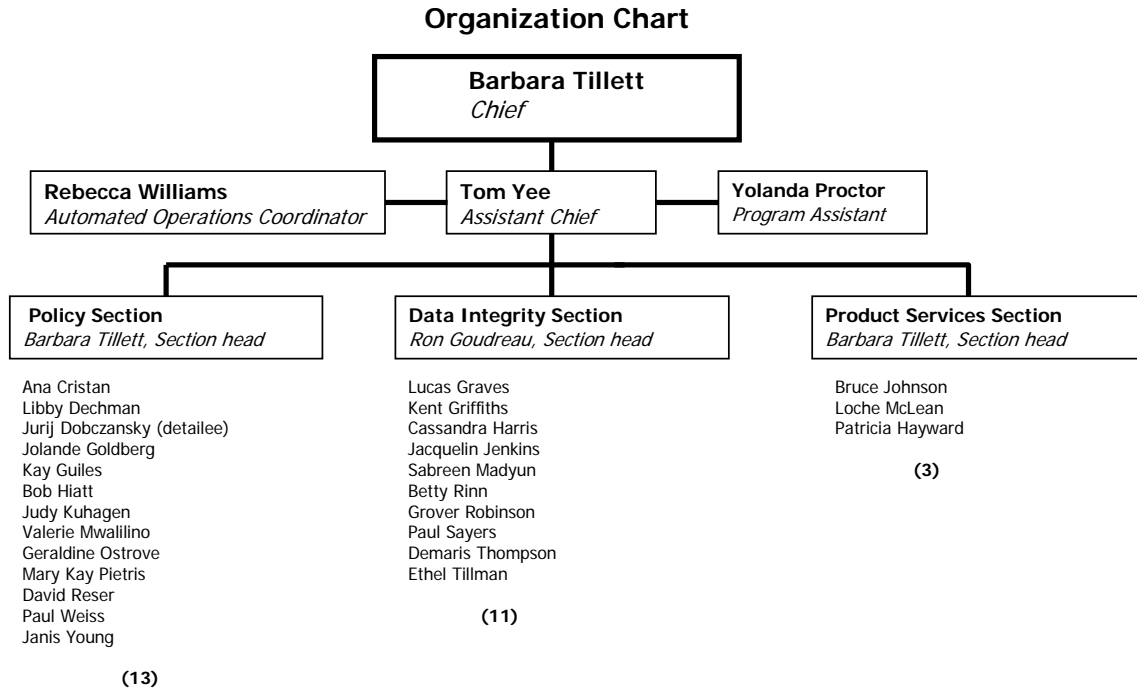
**June:** From the University of North Carolina, Chapel Hill, Renee McBride, Head of the Special Formats & Metadata Section at Davis Library and Ericka Patillo, a doctoral student at the library school, visited PSD. Their host was Libby Dechman, who gave them a tour and introduced them to the division. Larry Creider, Special Collections Librarian, New Mexico State University, spent a week in PSD working on the archives of the IFLA International Cataloguing Principles and the five world regional meetings associated with creating those principles. Tom Yee discussed the work PSD does with visitor Joanna Hause, chair of the American Theological Library Association Technical Services Interest Group. Tom and Dave Reser met with Sophie Viravong, Thai/Lao/Burmese cataloger at the National Library of Australia, to discuss LC’s plans to include Thai parallel script in catalog records. Jolande Goldberg was host to George Prager, head of technical services at New York University library, and Yael Mandelstam from Fordham University law library, both in town to attend ALA.

**September:** Marwa Anani and Ola Omar, librarians from the Bibliotheca Alexandrina in Alexandria, Egypt, visited LC. Tom Yee described the activities of PSD to them and showed them around.

## Appendix 4

### ORGANIZATION CHART AT END OF FY2010

## Policy and Standards Division



31: FTE

Rev: October 4, 2010