

CATALOGING POLICY AND SUPPORT OFFICE
ANNUAL REPORT
FY 2007
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CPSO ANNUAL REPORT, FY 2007

INTRODUCTION

The Cataloging Policy and Support Office's mission is to provide leadership in the creation and implementation of cataloging policy 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, 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.

I. THE YEAR'S HIGHLIGHTS

A. Statistical highlights

Bibliographic headings changed (through 10-10-07) FY07		419,540
DBIU	335,291	
PreMARC/QCFM teams	24,655	
Policy team	59,594	
CPSO email account messages/queries received		10,151
Weekly average	195	
LC databases maintained		
Name authority records		6,905,828
Subject authority records		305,821
Bibliographic records (approximate)		14,482,712
Special electronic notices of changes to cataloging policy and workflows (messages/postings)		78

See Appendix II for additional statistics.

B. International Developments

CPSO has continued its vision towards international agreement on basic cataloging principles, underlying conceptual models, and international cataloging rules for the

improvement of service to users and the simplification and increased efficiency of cataloging operations. Consequently, CPSO has been highly visible in the Joint Steering Committee for Development of RDA (JSC) (formerly called the Joint Steering Committee for Revision of the Anglo-American Cataloguing Rules) and in the International Federation of Library Associations and Institutions (IFLA). The series of world-wide meetings, International Meetings of Experts on an International Cataloging Code (IME ICC), coordinated and moderated by the CPSO chief, continued with IME ICC5, held in Pretoria, South Africa. Contacts with leaders of various World Wide Web initiatives, such as the Semantic Web increased.

See also under CPSO National and International Activities below.

JSC and RDA. LC's representative to the Joint Steering Committee for Development of RDA is CPSO's chief. Work on a new cataloging code, *Resource Description and Access* (RDA), has been under way for more than four years. This year the work maintained its vigorous momentum, and as drafts of its successive chapters appeared an appreciably larger proportion of the Chief's time, and the time of the descriptive policy specialists, was spent on this project than in FY 2006. This will increase further in FY08 and FY09 when RDA will be published and implemented. CPSO presented discussion papers and rule development proposals that were distributed for review, and commented, sometimes extensively, on other papers and proposals presented by other JSC members and the *RDA* editor. Comments formally presented by LC represented LC's official position on those issues, and were the product of consultations throughout the Bibliographic Access Divisions and LC's special collections where not only AACR2, the standard *RDA* will replace, but other descriptive cataloging standards are followed. Deadlines were tight in order to keep to *RDA*'s timetable with publication of the Web tool now targeted for 2009. JSC met twice during the year and consulted frequently via conference calls.

IFLA. The participation of CPSO's policy specialists and chief in descriptive cataloging and classification activities within IFLA is influential and visible. Two of CPSO's staff are official representatives from the Library of Congress to IFLA: Judy Kuhagen is the elected representative to the Cataloguing Section Standing Committee and Barbara Tillett is the elected representative to the Classification & Indexing Section Standing Committee. Some of the major IFLA initiatives that CPSO staff have been involved in include the continuing evolution and promotion of the Functional Requirements for Bibliographic Records (FRBR) and the Functional Requirements for Authority Data (FRAD), which expands the FRBR model into the realm of authority records. During this year Judy Kuhagen completed her terms as chair of the IFLA Cataloguing Section and as secretary to the IFLA Division IV : Bibliographic Control. Barbara Tillett completed her terms as secretary/treasurer to the Classification & Indexing Section and chair/treasurer to the IFLA Division IV : Bibliographic Control. Both continue as elected members of the respective Sections.

IME ICC. Another major long-term initiative, which is being conducted under the

auspices of IFLA, is the Statement of International Cataloguing Principles. The principles are being developed through a series of world-wide regional meetings, International Meetings of Experts on an International Cataloguing Code (IME ICC), whose aim is to reach global agreement on an updated set of basic cataloging principles that can underlie all the major cataloging codes used throughout the world. The CPSO Chief is the leader of the Planning Committee and the primary moderator of these regional meetings. Ana Cristán assisted the chief again this year in the coordination of ongoing discussion about the Statement of Principles through Web balloting among the invited participants in Africa, the region represented in this year's meeting, and in editing and producing the report of IME ICC4, held in Seoul, Korea. The IME ICC4 report was published by Saur and included information in English, Chinese, Japanese, and Korean. The fifth IME ICC meeting was held in Pretoria, South Africa, August 14-15, 2007. Ana Cristán assisted with the establishment of multi-lingual Web sites for each IME ICC.

Spanish-Speaking Countries. With the reassignment to CPSO last year of a specialist fluent in Spanish, we were able to pursue with greater flexibility our long-term objective of increasing the visibility of LC's international cataloging activities in areas of the world where Spanish is the primary language. Lecture and teaching trips were arranged as the result of this appointment.

C. New Directions

As part of the ABA Reorganization planning, the chief lead the "Acquisitions Issues Resolution Group" (AIRG) and the "Materials Handling Implementation Team." The assistant chief headed the "Space and Move Implementation Team." Other CPSO staff served on the "Training and Documentation Implementation Team."

CPSO participated in the various efforts taking place within the Library to prepare for a new generation of catalog to replace the obsolescent OPAC and to enable our online operations to resemble more closely those of the international Web community and less so the narrowly focused catalog applications that have been traditional to libraries. The Chief, attended meetings in London, as a byproduct of her membership in the Joint Steering Committee. The meeting was an RDA/Dublin Core/IEEE/LOM "Data Model meeting" at the British Library (the report can be read at: <http://www.bl.uk/services/bibliographic/meeting.html>), with representatives of the RDA, Dublin Core, IEEE/LOM, and Semantic Web communities. That meeting resulted in some very constructive recommendations to further collaboration and expose more of the RDA vocabularies to users on the Web, and to assure that data created following RDA will result in well-formed metadata.

The Chief also met with OSI staff members regarding future ideas for making LC's authority data available to the Virtual International Authority File to the Semantic Web applications and nominated one of those staff members as LC representative on a task

group discussing applications for the Semantic Web.

Work continued on the Virtual International Authority File (VIAF). VIAF is a project of LC, OCLC, the Deutsche Nationalbibliothek, and now also the Bibliothèque nationale de France. Ana Cristán and Larry Dixon (of LC's Network Development and MARC Standards Office) assisted Barbara Tillett to test, evaluate, and comment on VIAF matching of authority records and harvesting new, changed, and deleted authority records for personal and geographic names using OAI/PMH (Open Archives Initiative protocols).

The policy specialists and team leaders have also scheduled presentations by researchers in various fields of information science. This year such guests included Dr. Michael Buckland, UC-Berkeley, who gave a presentation on the results of his research in the development and testing of strategies to facilitate OPAC subject searching using LCSH. (A technical report of this project is forthcoming.) Dr. Dagobert Soergel, a faculty member at the University of Maryland School of Library and Information Studies, visited CPSO to give a presentation to the subject policy specialists on his research concerning classification analysis. Justin Thorp of LC's Office of Strategic Initiatives gave a demonstration that he developed for OSI staff of social tagging systems using folksonomies. The chief, assistant chief, and several cataloging policy specialists also attended several TeleVideo conferences with OSI and others from Stanford University on their project exploring searching clusters with LCSH. The chief served as an advisor to this OSI-sponsored summer internships for the Stanford postgraduates. Michael Kreyche from Kent State University presented his LCSH-ES system to provide access to Library of Congress Subject Heading terms in Spanish (February 23, 2007).

D. Local Developments

Owing to the redesign of the Library's Web pages for public information other than the OPAC page, the CPSO public Web site was absorbed into a new home page for the Acquisitions and Bibliographic Access Directorate, where documents and other information are arranged by content rather than administrative unit.

Though there were numerous cataloging-related activities generated here at the Library, some of which are described below, our cataloging operations were affected by events outside the Library as well. Chief among these events was the May 2006 acquisition by OCLC of the Research Libraries Information Network (RLIN) and subsequent merging of RLIN functions into OCLC's. Since our JACKPHY cataloging (Japanese, Arabic, Chinese, Korean, Persian, Hebrew, Yiddish) had been done in the RLIN system and the bibliographic records subsequently imported into our own database, the OCLC-RLIN merger forced us to do many things differently, including implementation this year of several new procedures (see <<http://www.loc.gov/catdir/cpso/fagnonroman.pdf>>, and <<http://www.loc.gov/staff/catdir/cpso/VoyagerJackphy.pdf>>).

CPSO played a major role to develop and document policies for JACKPHY cataloging in OCLC and assisted with the testing and then loading and trouble-shooting and record corrections that resulted in loading the RLIN records.

Classification Web. There were three new functions added to Classification Web (better known as Class Web), which is now the official version of the Library of Congress Classification scheme. When the online version of LCC was created, it was not anticipated that the Minaret system on which it is based would lead to the development of cataloging functions not possible elsewhere among the Library's various online systems. Some of the new functions are as follows:

Proposals. On November 13, 2006, CPSO implemented a newly-developed, Minaret-based system for submitting classification proposals custom-designed by the Minaret Corporation under a contract funded by CDS. It is for use both by LC catalogers and by SACO institutions who contribute classification proposals. The system has a user-friendly interface that greatly simplifies the process of creating the vast majority of classification proposals. LC catalogers have access to the system via their personal Minaret accounts. SACO contributors have access via their Classification Web accounts.

Genre/form headings. With the addition to LCSH of genre/form authority headings, tagged 155 in the MARC 21 Authority Format, access to LCSH, which has been available in Class Web for several years, was enhanced by adding a separate index for these headings and a new "Genre/Form Headings" button on the Class Web menu.

Production of weekly lists. The resolution of long-standing problems with production of the classification and subject weekly lists was achieved by transferring production to Minaret, the software program on which Class Web is based. The welcome result was that the entire process, from managing in-house subject and classification proposals to printing the lists, came under the control of CPSO and the weekly lists became much easier to produce than previously. These improvements significantly streamline the previously complicated system.

Library of Congress Subject Headings. There were several new departures and developments related to LCSH.

The Future of LCSH (Pre- vs. Post-Coordination of LCSH Report). The analysis of the future of LCSH requested by the Director for Acquisitions and Bibliographic Access Directorate (ABA) last year was completed and submitted. It addressed not only pre- versus post-coordination of headings, but also recommendations on how automation could be better utilized to facilitate the assignment of headings, to economize the time spent on subject cataloging, and to enhance end-user responses to subject searches. Upon the Director's and

ABA management review, the recommendations were approved in April 2007, and financial planning to implement them began. A follow on report regarding the implementation of the recommendations was submitted to the Director in September.

Authority records for verification of subject strings. Working with the ABA automation expert, programs were developed that enable CPSO's Subject Headings Editorial Team (SHed) to create authority records from bibliographic headings. The programs will be run on commonly used subject strings in the LC bibliographic database, i.e., strings used 50 or more times. The function of these "validation" authority records is to enable machine validation of subject access points, thereby greatly improving their accuracy, and ultimately significantly enhancing end-user discovery of resources as they search the database. Approximately 2,500 such records were created in FY 2007.

Genre/form headings. The genre/form projects described below are experiments that represent stages of CPSO's planning for the implementation of genre/form terms in LCSH. CPSO kept colleagues informed of our progress in the genre/form heading initiative not only with written information but by public presentations at meetings of the American Library Association (OLAC CAPC, SACO, ALCTS CCS), and the Atlantic Chapter of the Music Library Association. Meanwhile, the routine editorial review and maintenance of the *Library of Congress Subject Headings* continued. Approximately 220 Genre/form subject authority records were created during FY07, as this project began.

Genre/form headings: Moving images. Under the auspices of CPSO, the creation and distribution of LCSH genre/form authority records for moving image terms (MARC 21 field tag 155) began. By fiscal year's end approximately 100 records, roughly one-third of the eventual total, had been created and distributed. A new instruction sheet for the *Subject Cataloging Manual: Subject Headings*, H 1913, was written to provide guidance in how to formulate and assign these new headings. Cataloging of moving image materials is done in the Motion Picture, Broadcasting, and Recorded Sound Division (MBRS). The terms being added to LCSH are based on two lists, MBRS' *Moving Image Genre-Form Guide* and *Moving Image Materials: Genre Terms*, by Martha Yee.

Genre/form headings: Radio. Collaboration began with sound recordings catalogers in MBRS to convert to LCSH their *Radio Form/Genre Terms Guide*, which is structured as a thesaurus and contains about 70 terms for genres and about 10 more subdivisions for form terms.

Genre/form headings: Music. The implementation of MARC 21 155 and 655 fields based on existing LCSH terms now assigned 150 and 650 field tags is being explored using terms from the discipline of music. This discipline has by

far a larger number of form terms in LCSH than any other. As a result, this project is much larger in scope than the two projects described above, with regard both to the number of headings and the number of bibliographic records involved. Furthermore, because the vocabulary is already in LCSH, terms are often related to each other by virtue of syndetic structure. As investigations during the year demonstrated, the challenging issues are not identification of vocabulary, or what to put in a 155 authority record, but how to manage implementation of this type of subject access in a well established and large system, especially of the Library of Congress, whose authority records are used by thousands of other libraries world wide. CPSO received offers to help with genre/form implementation from OCLC and the Music Library Association. OCLC contributed a copy of its FAST file of music authority headings, many of which were created from bibliographic records in WorldCat.

Subject Cataloging Survey. During this year CPSO detailees completed a survey of LC subject catalogers regarding suggestions to improve the subject cataloging process. Many of the suggestion were included as part of the above mentioned analysis of LCSH.

Cataloging documentation. Owing to the anticipation of a new descriptive cataloging code in 2009, *Resource Description and Access*, only the most compelling new Library of Congress rule interpretations for the present code, AACR2, were issued. These were LCRI's for the following AACR2 rules:

- 6.7B10 (February 2007) - Physical description of sound recordings
- 6.7B18 (February 2007) - Contents notes for sound recordings
- 22.1 (May 2007) - AACR2 compatible headings policies relaxed
- 22.1B (August 2006 (p. 1-2); May 2006 (p. 3-4)) - Persons treated in the same manner as authors
- 22.1C (May 2007) - Omitting British terms of honor from headings for persons entered under surname
- 22.2 (May 2007) - Choice among different names
- 22.2B (May 2007) - Choice among different names. Pseudonyms
- 22.3A (May 2007) - Fullness of names
- 24.4B (November 2006 (p. 1-2); February 2007 (p. 3-4)) - Names not conveying the idea of a corporate body
- 24.4C (February 2007) - Two or more corporate bodies with same or similar names
- 26.2C (February 2007) - "See also" references with names of persons
- 26.2D (May 2007) - Explanatory references with names of persons

Counting all electronic announcements or postings, CPSO sent 36 email messages in-house, posted 22 files on the CPSO Web pages, posted 16 messages to Listservs (Classweb-users, NMP-L, PCCLIST), issued 4 print documents as email attachments or PDF files, and prepared revisions to various CONSER documents. Other

documentation continued to be issued as usual. For additional information, see Appendix I.

II. OVERVIEW OF CPSO ACTIVITIES

A. Subject Headings Editorial Team (SHed). The *Library of Congress Subject Headings* master database and the corresponding records in LC's local database are maintained by the Subject Headings Editorial Team. At the end of the fiscal year the team consisted of the team leader, one associate editor, one assistant editor, and an assistant. With able additional help from staff members from the PREMARC/Quality Control and File Management Team, SHed managed to keep current with incoming proposals and to process 9,206 proposals for new subject headings and 5,926 proposals to correct existing subject headings. The major new development was the transfer of production of the *LCSH Weekly Lists* from the Cataloging Distribution Service to Information Technology Services (ITS). This was accomplished after several months of intense review of test lists. Nearly all problems have been resolved in the ITS production of subject heading weekly lists.

SHed also began creating two new kinds of authority records. The first was genre/form subject headings tagged "155." During FY07, 220 of these records were created and vetted on weekly lists. The second kind of record was "validation" records for LCSH pre-coordinated strings of subdivisions. Some of these validation authority records were created one by one by Allis Robinson using a list of free-floating subdivisions. Additionally, David Williamson created a program that automatically generated "validation" authority records by searching the Library of Congress database for terms which were used in LC cataloging since 2000, and which were applied to 50 or more bibliographic records. To date, 2,500 validation records have been created.

B. PREMARC/Quality Control and File Management Team (QCFM). In FY07, the team corrected 24,655 bibliographic records. The expansion of the skills of individual team members was significant in the team's accomplishments not only because it enabled those staff members to undertake new types of corrections they had not previously handled, but it is important preparation for the planned reorganization of CPSO's database maintenance units.

Team members who work on records from the Baseline Inventory Project, Jacquelin Jenkins, Marian Johnson, and Vondell Johnson, updated many of those records sufficiently for the records to be distributed by CDS. During the year, approximately 2,000 records were fully updated to conform to authority records in all MARC 21 fields that contained access points for headings, and the records' encoding level revised, if necessary. Jacqueline Jenkins and Vondell Johnson continued to assist SHed in preparing LC Subject Heading *Weekly Lists*, of which 51 are produced every calendar

year. Allis Robinson corrected over 1,000 name authority records that were reported as conflicts, and also resolved other problems such records were found to have. Demaris Thompson assisted SHed in preparing the WordPerfect versions of the *Weekly Lists* for mounting on the CPSO Web site and corrected the online records as well. Cassandra Harris corrected records rejected during CDS's processing of them for distribution and also corrected LC records in RLIN and OCLC. She routinely corrects bibliographic records whose subject headings have to be revised as a result of newly approved subject proposals.

C. Database Improvement Unit (DBIU). The content of the main bibliographic database of the Library of Congress is managed principally by CPSO. It contains approximately 14,131,743 bibliographic records, supported by 6,893,712 personal, corporate, and geographic name authority records, and 305,821 subject heading and subject subdivision authority records.

As they did last year, DBIU corrected a very impressive quantity of records: 335,291 bibliographic records were corrected in Voyager, 1,800 in RLIN, and 1,600 in OCLC. This work brings the total number of bibliographic records corrected by the unit since its inception in August 2004 to 1,422,402.

During this year, Lucas Graves became a full-time member of DBIU. His expertise with languages has resulted in the correction of records in many languages as well as the addition of Greek captions for the Library of Congress Classification schedule for Greek literature.

D. Classification Editorial Team (CLED). The Library of Congress Classification (LCC) database's routine maintenance is done by CLED. In FY07, there were 19,990 classification records created and/or modified. In addition, 1,425 table records were created. CLED also produces the classification Weekly Lists, of which 51 are issued each calendar year. The approved weekly lists are available online at: <<http://www.loc.gov/aba/cataloging/classification/weeklylists>>. A new automated system for submitting classification proposals and producing the LCC Weekly Lists was implemented on November 13, 2006. In preparation, Mary Kay Pietris gave a series of training classes for LC catalogers using documentation developed by Paul Weiss. This new classification proposal system greatly reduces the amount of manual keying and re-keying by CLED staff and significantly streamlines the process for producing weekly lists. This automated proposal system is used by LC catalogers and PCC SACO participants who subscribe to Classification Web. Catalogers enjoy using the system and have reported that it is easy to use. Since the implementation of the online classification proposal system, 2,479 new schedule records and 430 table records have been created. For the last half of the year CLED had only one assistant editor following the unfortunate death of Barry Bellinger on July 3, 2007. Mary Kay Pietris stepped in to help CLED keep current with classification proposals and documented workflows that involve CLED with an eye towards further streamlining the process.

E. LC Classification Schedules. Newly revised by CPSO and published by CDS were E-F History, America; H Social Sciences; M Music; N Fine Arts; subclass PN Literature (General); Q Science, and T Technology. While the schedules continue to be printed and available in paper volumes that are reprinted periodically, the online subscription product, *Classification Web*, is the official version. *Class Web* is updated daily, overnight.

Law projects. LC's law classification specialist has been a leader in a world-wide initiative to digitize rare law materials for posting on the Web. These materials are both being made easily accessible, and to being preserved in digital form. Institutions collaborated with during this fiscal year include the National Library of Romania in Bucharest and the Bucharest University/Central Library; collections pertaining to the Kingdom of Hawaii (ca.1810 to 1894) at the University of Hawaii Law School in Honolulu; Cornell University; and the University of California School of Law in Berkeley, as well as the Library of Congress African and Middle Eastern Division, where there are approximately 200 law manuscripts. Links to digitized maps continued to be added to law classification schedules. Classification development was under way for KBS-KBX (Eastern Churches and Church (Protestant) law). Development of law schedules KIA-KIX (Law of the Indigenous Peoples of the Americas), continued, including collaboration by the law classification specialist with libraries with significant holdings of these materials. KIA-KIX will be converted to HTML as a BEAT project, a format in which they can be made available at no cost on the Web. Selected law schedules also joined the religious and literature classification schedules in incorporating non-roman scripts into the captions, as now can be seen in KBP (Islamic law) and KNN (Chinese law).

F. Policy Team. The policy specialists continued the day-to-day work of responding to LC catalogers' queries, CPSO email queries, telephone, mail, and hosting visitors, in addition to their individual responsibilities for various documentation, standards maintenance, and problem resolution for bibliographic and authority data.

The chief's activities in IFLA and as a member of the JSC again led to invitations to speak and consult in the library community world-wide, including the United States (Massachusetts Library Association conference, Sturbridge, Massachusetts, May 3-4, 2007; Ohio Valley Group of Technical Services Librarians pre-conference on RDA and IFLA initiatives, Bowling Green, Kentucky, May 16, 2007; ACURIL conference, San Juan, Puerto Rico, June 3-6, 2007); Canada (JSC, Ottawa, April 16-20, 2007); Europe (The Hague, Netherlands, December 2006 and April 2007; RDA/DC/IEEE/LOM "Data modelling" conference, London, April 30-May 1, 2007; Reykjavík, Iceland, February 1-2, 2007); South America (FEBAB conference, Brasilia, Brazil, July 10-11, 2007); and Africa (IFLA and IGBIS conference, Pretoria and Durban, South Africa, August 2007).

G. CPSO National and International Activities. CPSO represents the Library in various international and national cataloging and metadata policy bodies and

professional organizations, collaborates in the creation and revision of cataloging standards, promotes the maintenance of standards by offering continuing education, and reports to colleagues and sister organizations and institutions on Library of Congress cataloging activities. In terms of the visibility of CPSO's involvement, the most important among the organizations where CPSO represents LC are the JSC and the IFLA Cataloguing Section and Classification and Indexing Section, several sections and committees in the American Library Association (ALA) and the American Association of Law Libraries (AALL), and the United States Board on Geographic Names Domestic Names Committee.

Professional organizations and other groups in which staff served

- American Association of Law Libraries
 - Technical Services Interest Section
 - Cataloging & Classification Standing Committee (CPSO liaison)
 - Classification & Subject Cataloging Policy Advisory Committee (CPSO liaison)
 - Subgroup on legal form/genre terms (CPSO liaison)
 - Working Group (CPSO liaison)
 - Descriptive Cataloging Advisory Working Group (CPSO liaison)
 - Education Committee
 - Federal Law Librarians Caucus
 - Foreign, Comparative and International Law Special Interest Section
 - Special Interest Group: Long-Range Planning Committee
 - Native Peoples Law Caucus (CPSO liaison)
 - Roundtable for Head Catalogers at Large Libraries
 - Roundtable for Heads of Technical Services
- American Bar Association
- American Library Association
 - ALA RDA Implementation Task Force
 - ALCTS/PCC committee for developing basic series training materials
 - Authority Control in the Online Environment Interest Group
 - Catalog Form and Function Interest Group
 - Cataloging Cultural Objects program
 - Committee on Cataloging: Description and Access (LC representative)
 - Committee to revise the major/minor change document
 - Format Variations Working Group Implementation Group
 - FRBR Implementer's Group
 - International Relations Committee
 - Joint CCS/PCC Committee on Continuing Education Training Materials (chair)
 - Joint Initiative on Subject Training Materials (LC representative)
 - Joint SAC/PCC Task Force on LC Classification Training Materials
 - LITA/ALCTS Authority Control Interest Group

MARC Formats Interest Group
 RDA Update Forum
 Subject Analysis Committee (LC representative)
 Subcommittee on FAST
 Subcommittee on Semantic Interoperability
 Subcommittee on the Future of Subject Headings
 American Society of International Law
 Indigenous Peoples Interest Group (executive board)
 Teaching International Law Interest Group (executive committee)
 Association of American Law Schools
 Legal Information Preservation Alliance
 CONSER
 Access Level Record for Serials Working Group
 PCC Ad Hoc Series Review Task Force
 Council on Geographic Name Authorities (LC representative)
 ICABS (IFLA-CDNL Alliance for Bibliographic Standards) Advisory Board
 IME ICC (IFLA Meeting of Experts on an International Cataloguing Code)
 5th IFLA Meeting of Experts on an International Cataloging Code, Pretoria,
 South Africa (chair, planning committee; conference moderator; report
 editor)
 International Association of Music Libraries, Archives, and Documentation
 Centres
 Compiler and editor, annual published bibliography, "Recent Publications in
 Music"
 Constitution Committee
 ISO Liaison
 International Federation of Library Associations (annual conference in Durban
 and special meetings in The Hague)
 Cataloguing Section Standing Committee (LC representative; chair)
 Working Group on the Use of Metadata Schemas
 Classification and Indexing Section Standing Committee (LC
 representative is secretary/treasurer)
 Division IV: Bibliographic Control (chair)
 Coordinating Board (secretary)
 Division liaison to the the ICABS (IFLA-CDNL Alliance for Bibliographic
 Standards) Advisory Board
 FRANAR (Functional Requirements and Numbering of Authority
 Records) Working Group on FRAD (Function Requirements of Authority
 Data)
 FRBR Review Group
 FRBR Working Group on Aggregates
 FRBR Working Group on the Expression Entity
 FRSAR Working Group
 Governing Board

Governing Board Liaison to the UNIMARC Advisory Board
 ICABS Advisory Board (IFLA-CDNL Alliance for Bibliographic Standards)
 ISBD Material Designation Study Group
 ISBD Review Group
 Professional Committee
 UNIMARC Advisory Board, Governing Board Liaison
 International Standards Organization
 ISO 639 Joint Advisory Committee, International Standards for Language Codes
 Joint Steering Committee for Development of RDA (formerly the Joint Steering Committee for Revision of the Anglo-American Cataloguing Rules) (LC representative)
 Law Library Microform-Digital Consortium (Councilor, Advisory Council)
 Music Library Association
 Joint MLA/UMCP Committee on the MLA Archives (chair)
 Subject Access Subcommittee (LC representative)
 National Information Standards Organization Thesaurus Revision Advisory Group (revision of ANSI/NISO Z39.19)
 OCLC
 FAST (Faceted Application of Subject Terminology) Project Team
 Program for Cooperative Cataloging
 BIBCO Operations Committee
 CONSER Operations Committee
 Standing Committee on Standards
 Standing Committee on Training
 Seminar on Acquisitions of Latin American Library Materials
 Subcommittee on Cataloging and Bibliographic Technology (chair)
 United States Board on Geographic Names
 Domestic Names Committee (LC representative; past chair)
 Virtual International Authority File (LC/OCLC/Die Deutsche Nationalbibliothek/Bibliothèque nationale de France) Project

Collaboration on projects and other activities outside LC. CPSO staff also served as official and informal consultants to many organizations, sometimes carrying out their responsibilities away from the Library, and sometimes by meeting with visitors to LC. This year staff collaborated on projects and other activities with representatives from:

Africana Librarians Council Cataloging Committee (CPSO representative)
 ALA Publishing (RDA in Catalogers Desktop)
 Arabic Union Catalog director (non-roman access, access to Arabic script tools)
 Association of College and Research Libraries (review, draft of *Descriptive Cataloging of Rare Materials (Serials)*)
 Benjamin Franklin Library, U.S. Embassy, Mexico City (queries via a U.S. State Dept. Web chat site from librarians from Argentina, Costa Rica, El Salvador,

Ecuador, Guatemala, and Mexico)
Bucharest, Romania, Ministry of Education and Research (cooperative library programs with LC)
Casalini libri (LC agreement on bibliographic records)
Cornell University libraries (consultant on digitizing American Indian law materials) (workflow procedures for added access points in bibliographic records)
Delphi Study on Metadata and the Future of Cataloging, Kent State University
IME ICC4 (compiler of comments and editor of proceedings, Seoul, Korea meeting)
International Federation of Library Associations
FRBR (amendment on the expression entity)
ISBD (LC's response to the draft of the consolidated ISBD)
Music Library Association (name heading changes for the "Report from LC" in the monthly *Music Cataloging Bulletin*)
NACO (Unicode implementation, word spacing for CJK materials, Korean romanization, non-roman scripts in authority records)
National Agricultural Library and National Library of Medicine (RDA)
National Library of Russia, St. Petersburg (certain WorldCat records for comparison with their own cataloging)
National Science Foundation, Office of Cyberinfrastructure (LC's Digital Future and You presentation)
OCLC (migrating JACKPHY records, beta testers for WorldCat Identities)
Outsell, Inc. (their contract regarding ABA reorganization)
Project MACS (LC's involvement)
Russian State Library, Moscow (Project RuGeo)
State Archives of Hawaii (consultant for digitization of law collections of the Kingdom of Hawaii)
University of Hawaii Law School (consultant for digitization of law collections of the Royal Hawaiian period)
University of Tulsa College of Law (consultant for digitization of American Indian law collections)

Visitors to CPSO

Visitors to the Library with professional interests related to librarianship or information science often request tours of CPSO and briefings on CPSO activities. This year's visitors included:

Michael Buckland, University of California, Berkeley
Nancy Carol Carter, director, Legal Research Center, and law professor,
University of San Diego
Luis Afonso Costa de Medeiros, Brazilian lawyer
Jerry Dupont, Law Library Microform-Digital Consortium

Tania Alaix Gimbert, Spanish lawyer
Michael Kreyche, Kent State University
Dagobert Soergel, University of Maryland College of Information Studies
Ana Tarhini, Lebanese parliamentary librarian
Other visitors from:
 Bibliotheca Alexandrina, Alexandria, Egypt
 Library of Virginia
 National Library of China
 University of Barcelona
Library school students from:
 Drexel University
 University of Wisconsin

Conferences, etc. Conferences and other events at which staff members gave formal presentations as speakers or panelists:

ALA
Terms")
 ALCTS CSS ("Implementing MARC 21 Fields 155 and 655 Genre/Form
 ALCTS Forum on the Future of Cataloging (responsibilities to less developed countries of national libraries in wealthy countries that distribute cataloging products)
 Electronic Resources Interest Group (RDA)
 American Association of Law Libraries ("Indigenous Government & Law in the Americas: LC Classes KEA-KIX; a Gateway to Web Resources?")
 American Theological Library Association (LCSH briefing)
 Association of Caribbean University Research and Institution Libraries (plenary presentation on RDA; panel on organization and retrieval of information in a networked environment)
 Catholic Library Association (RDA briefing)
 FEBAB (Federação Brasileira de associações de Bibliotecários, Cientistas da Informação e Instituições) conference, Brasilia (principles of cataloging in the 21st century; RDA and the influence of FRBR and other IFLA initiatives)
 Cataloging committee (AACR2 and AACR3/FRBR)
 FLICC/FEDLINK (RDA)
 IFLA 73rd General Conference and Council (Durban, South Africa)
 Cataloging Section (report, IME ICC5)
 Division IV Programme (moderator)
 ICABS programme (controlled vocabularies and the Semantic Web0
 Publications Programme (IME ICC4)
 IME ICC5 (Pretoria, South Africa) on VIAF, Paris Principles, IME ICC process, etc.
 Librarians Association of South Africa (LIASA) IGBIS Group (FRBR and cataloging rules)

Massachusetts Library Association (RDA)
Music Library Association
 Subject Access Subcommittee open meeting (work at LCC on X55 fields
 in LCSH)
New Jersey librarians sponsored by Congressman Rodney Frelinghuysen
 (acquisitions and bibliographic processes)
Ohio Valley Group of Technical Services Librarians (pre-conference workshop,
 “Cataloging Issues – International Initiatives: RDA and Related IFLA
 Activities”)
Online Audiovisual Catalogers
 Cataloging Policy Committee (genre/form projects at LC)
Reykjavík, Iceland (seminar on RDA, the new cataloging code that will replace
 AACR2)
SACO-at-Large meeting (genre/form projects at LC)
Seminar on the Acquisition of Latin American Library Materials
 Cataloging and Bibliographic Technology Subcommittee (update on LC
 cataloging)
University of Wisconsin School of Library and Information Science students (IFLA
 cataloging initiatives, RDA, LC’s cataloging workflow)
World Digital Library Planning Group (consulting service regarding metadata)

Consultation and collaboration within LC. Within the Library, CPSO staff members were consulted by or collaborated with colleagues outside CPSO on a broad range of topics and activities.

ABA chiefs (pre- vs. post-coordination of subject headings)
LC MARC Review Group (MARBI proposals and discussion papers)
Motion Picture, Broadcasting & Recorded Sound Division moving image and
 sound recordings catalogers (adding genre/form terms to LCSH)
National Audio-Visual Conservation Center, Culpeper, Va. (briefing on CPSO for
 catalogers)
Office of Security and Emergency Preparedness (floor warden and office
 emergency coordinators)
Office for Strategic Initiatives (pilot project, social tagging of digitized
 photographs; future ideas for the Virtual International Authority File and the
 Semantic Web)
 Web Service (meeting, “Improving Information Access and Discovery for a
 Superior User Experience”)
Online Audiovisual Catalogers
Preservation Reformatting Division and Ser2Dig Group (digitizing LC’s annual
 report of the Librarian of Congress)
Rare Book Division (links between off-site digitized books and LC catalog records
 for them and final work to edit and publish DCRM (B))
Serial Record Division (formal review of subject headings and classification work

of several catalogers)
Subject Authority Cooperative Program (genre/form moving image terms in LCSH)
Various staff (distribution of Leader Bibl. Level code “i” for integrating resources; JACKPHY cataloging post-RLIN)

Within the Library, CPSO staff sat on various Cataloging Directorate and Library Services committees and official units. These include:

ABA reorganization
Implementation team
Materials Handling Implementation Team (head)
Space and Move group (head)
Acquisitions Issues Resolution Group (head)
Training and Documentation Implementation Team
Baseline Inventory Program (co-manager, specializing in problem resolution)
Cataloging Technicians Advisory Committee
LC/MARC Review Group (representing CPSO)
Library Services Strategic Plan (working groups, 2.A.1, 2.B.3, 2.C.1, 3 A.3, 4.D.3)
Little Loaders (subgroup to examine post-RLIN options for input of JACKPHY data)
Music Cataloging Advisory Group (chair)

H. Teaching and Training

Along with the standard instruction CPSO provides in the form of cataloging documentation, teaching is another major activity of CPSO staff. Staff members develop courses, write teaching materials, teach classroom courses and workshops, provide training for established and *ad-hoc* groups, offer formalized supervision to individuals on a long-term or short-term basis, and serve as advisors. Instruction is given on-site to LC staff and to visitors who have come here for training, and it is given outside of LC elsewhere in the United States and abroad. CPSO often works in conjunction with LC’s Instructional Design and Training Division and with professional organizations such as the American Library Association ALCTS and the Program for Cooperative Cataloging to write instructional materials, train trainers, and give courses and workshops. During this fiscal year, teaching and other training activities included:

Classes given for LC staff only (regularly scheduled; some frequently offered)

For the Instructional Design and Training Division
Copy Cataloging: Validating Subject Headings
Geographic Headings and Subdivisions in LCSH
Library of Congress Classification: Introduction
Library of Congress Classification: Proposals (new)
Library of Congress Subject Headings: Introduction

Shelflisting: Introduction
Subdivisions in LCSH

Classes, etc. given for LC staff and others

ALCTS/PCC Basic Series Workshop (2 days)
Series training (3 days)
Train-the-Series-Trainer (1 day)

Custom-designed courses, etc. taught outside LC

NACO-MEXICO funnel project members of the RESBUIC (Red de Sistemas de Bibliotecas de las Universidades del Centro) cataloging consortium (4-day NACO training workshop in Spanish)

Formal review of catalogers' bibliographic records

for Serial Record Division catalogers

III. STAFF

Awards and honors

Length of service awards

Demaris Thompson, 30 years
Robert Hiatt, 40 years
Kay Guiles, 50 years

Other

Special Achievement Awards for their participation as members of strategic planning Working Groups, in recognition of their contributions to Library Services' ongoing strategic planning effort
Jolande Goldberg
David Reser
Paul Sayers
Barbara Tillett

Publications, etc.

"VIAF (Virtual International Authority File): Linking the Deutsche Nationalbibliothek and Library of Congress Name Authority Files," Rick Bennett, Christina Hengel-Dittrich, Edward T. O'Neill, and Barbara B. Tillett. [In Chinese] Journal of the National Library of China, v. 15, no. 4 (October 2006), p. 87-91.

"Library of Congress controlled vocabularies and their application to the Semantic Web," by Corey A. Harper and Barbara B. Tillett. Cataloging & Classification Quarterly, v. 43, no. 3/4 (2006), p. 47-68. Also available at:
https://scholarsbank.uoregon.edu/dspace/bitstream/1794/3269/1/ccq_sem_web.pdf

- “Cataloging codes and conceptual models: RDA and the influence of FRBR and other IFLA initiatives,” presentation by Barbara B. Tillett for Cataloguing 2007. Back to the Basics – and Flying into the Future. Reykjavík, Iceland, 1-2 February 2007. Available at: <http://www.congress.is/cataloguing2007/index.asp?q=Presentations>
- “Numbers to Identify Entities (ISADNs – International Standard Authority Data Numbers), Barbara B. Tillett. Cataloging & Classification Quarterly, v. 44, no. 3/4 (2007), p. 343-361.
- IFLA Cataloguing Principles: Steps towards an International Cataloguing Code, 4. Report from the 4th Meeting of Experts on an International Cataloguing Code, Seoul, Korea, 2006. Edited by Barbara B. Tillett, Jaesun Lee and Ana Lupe Cristán. München: Saur, 2007. 672 p. (IFLA Series on Bibliographic Control; vol. 32) ISBN 978-3-598-24281-6. (In English, Chinese, Japanese, and Korean)
- “RDA y la influencia de FRBR y otras iniciativas de IFLA,” Barbara B. Tillett [sic]. In: Memoria del Segundo Encuentro Internacional de Catalogación: Tendencias en la teoría y práctica de la catalogación bibliográfica, 12 al 14 de septiembre de 2006. Compiladores: Filiberto Felipe Martínez Arellano, Ariel Alejandro Rodríguez García. México : UNAM, Centro Universitario de Investigaciones Bibliográficas, Library Outsourcing Service, 2007, p. 3-23.

Courses and other instruction taken

Most of the instruction taken by CPSO staff members was in classes given at LC for LC staff. Staff members also attended classes or workshops off-site.

Cataloging Concepts: Descriptive Cataloging
 eManagement briefings (budget preparation)
 e-Resources SkillBuilder: The Blog
 Hypersnap 5: Basic
 WWW: Portals
 WWW: Evaluating Web Sites
 Uniform title workshop given by Robert Ewald (CPSO ret.)

Personnel Changes

Reassignment to CPSO

Lucas Graves (from Music and Sound Recordings Team II)

Reassignment from CPSO

Ann Bowman (to Motion Picture, Broadcasting & Recorded Sound Division)

Detail from CPSO

Barbara Tillett continued as acting chief, Cataloging Distribution Service (simultaneous with CPSO chief position)

Full-time detail to CPSO

Valerie Mwalalino (from European and Latin American Acquisitions
Division to Policy Team)

Part-time details to CPSO

Rosa Alicea (DBIU)
Tom Bishop (DBIU)
Mitzi Collins (DBIU)
Edith Creeger (DBIU)
Carroll Davis (Policy Team)
Paul Frank (Policy Team)
Rose Graves (DBIU)
Kay Ritchie (DBIU)
William Robboy (Policy Team)
Janis Young (Policy Team)

Deceased

Barry Bellinger

**APPENDIX I: Print and Electronic Publications
FY 2006**

As of December, 2005 the publication schedules of CPSO publications reproduced in *Catalogers Desktop* are coordinated with the quarterly updates to the *Desktop*.

- Cataloging Service Bulletin*. Quarterly
 - no. 113, Fall 2006
 - no. 114, Winter 2006
 - no. 115, Spring 2007
 - no. 116, Summer 2007
- Descriptive Cataloging Manual*
 - Revisions of DCM Z1
 - 2007 Update, no. 1 (Feb.)
 - 2007 Update, no. 2 (May)
- Free-Floating Subdivisions: an Alphabetical index*. 19th ed. annual
- LC Cataloging Newslines*. frequency varies
 - v. 15, no. 1
- Library of Congress Classification*, new editions
 - Class E-F, History: America*
 - Class H, Social Sciences*
 - Class M, Music*
 - Class N, Fine Arts*
 - Subclass PN, Literature (General)*
 - Class Q, Science*
- LC Classification; Weekly Lists* (Tentative; Approved)
- Library of Congress Rule Interpretations*, 2nd ed., 1989
 - 2006, Update No. 4 (November)
 - 2007, Update No. 1 (February)
 - 2007, Update No. 2 (May)
 - 2007, Update No. 3 (September)
- Library of Congress Subject Headings*, 30th ed. (2007) annual
- LC Subject Headings; Weekly Lists* (Tentative; Approved)
- MARC Code List for Geographic Areas* (new ed.)
- MARC Code List for Languages* (new ed.)
- Subject Cataloging Manual: Subject Headings*
 - 2007 Update No. 1 (February)
 - 2007 Update No. 2 (August)

**Appendix II: STATISTICS
FY 2007**

CATEGORY	DETAILS	TOTAL
Baseline Inventory Project H/I records added or altered		500
Cataloging and cataloging review for:		
Arts and Sciences Cataloging Division (copy cataloging, encoding level 7)		
Authority records created		4
Books cataloged		29
New subject headings		68
Revised subject headings		3
New classification numbers		9
Revised classification numbers		1
Law Library		
Titles reclassified		77
Descriptive cataloging		70
Serial Record Division		
Cataloging review, subject headings and classification		566
Correspondence		
Incoming (CPSO email account messages)		10,151
Weekly average	195	
Outgoing		10,065
Internal	3,286	
External	6,779	
Databases: Size		
Bibliographic records		14,482,712
Authority records (names; subjects)		7,211,649
LCSH master database records as of Sept. 30, 2007	305,821	
Names	6,905,828	
Classification records (total)		619,542

Schedule records	443,024	
Table records	176,518	
Bibliographic file maintenance, FY07		
Bibliographic records updated		419,540
Database Improvement Unit	335,291	
PREMARC/Quality Control and File Maintenance Team	24,655	
Specialists	59,594	
Books relabeled		
CIP verification		0
Error reports received		1,153
Internal	197	
External	956	
Ft. Meade holdings records call number changes		389
LCCN duplicates reconciled		376
Classification records created or modified, FY07		21,415
Schedule records	19,990	
Table records	1,425	
Music 053 project (ML410-ML429)		
Name authorities to which 053s added		132
Other NARs created or updated		48
Bibliographic records updated		108
Titles reclassified		29
Phone queries		592
Internal	539	
External	53	
Replacement copies added to the general collections		0
Visitors		387
Internal	366	
External	21	