

**2020**

# **OLAC NEWSLETTER**



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# THE OLAC NEWSLETTER

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Material for publication in the OLAC Newsletter should be sent to the appropriate editor. Persons wishing to review books should contact Richard Leigh and indicate their special interests and qualifications. For AV cataloging questions, contact Jay Weitz. Articles should be submitted in electronic form, using standard word-processing software, and consistent in length and style with other items published in the Newsletter. For further guidance, please check the [OLAC Newsletter Editorial Stylesheet](#). Persons wishing to nominate themselves or other OLAC members for *In the Spotlight* should contact Lisa Romano.

## From the Editor

*Marcia Barrett*



This is my last issue as *OLAC Newsletter* Editor-in-Chief. The upcoming September issue will be created by Laura McElfresh (University of Minnesota), incoming Editor-in-Chief. I am so grateful to have had the opportunity to serve OLAC in this way and to have had the pleasure of working with such wonderful colleagues through participation on the OLAC Executive Board.

I share what Thomas expressed in his President’s Column – that I am very proud to be a member of this organization. Although we may be small, we are mighty! I am so appreciative of all of the work so very many people do to keep our organization running and to offer opportunities such as the first OLAC Virtual Conference, coming up in October. Finally, it is an honor to be part of an organization with such esteemed and outstanding members of the profession. This issue features two OLAC members honored by major ALCTS awards, in addition to evidence of OLAC members’ dedication to cataloging in every article.

Thank you so much!

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## From the President

*Thomas Whittaker*



Greetings all,

I would be remiss not to at least acknowledge how much things have changed since my last “From the President” column. As I am sure many of you can also attest, I find myself now in a very different place, physically, mentally, and emotionally. Please take care of yourselves, and each other.

Following our elections this spring, I am pleased to welcome to the OLAC Executive Board our new Vice President/President-Elect, Emily Creo (Four County Library System). I would also like to congratulate Nicole Smeltekop (Michigan State University) for securing her second term as OLAC Secretary. Thank you to all who voted, and a special thank you to the great slate of candidates this year.

In other changes to the Executive Board, I will soon be passing the President’s gavel to Kristi Bergland (University of Minnesota) and transitioning into the role of Immediate Past President. Mary Huisman (St. Olaf College) will become the Past President, replacing Jeremy Myntti (University of Utah) who has completed four years of exemplary service to the OLAC Board. The Board will also be saying goodbye to our Newsletter Editor, Marcia Barrett (UC Santa Cruz) and our CAPC Chair, Jessica Schomberg (Minnesota State, Mankato). Thank you both for your work on the Board. As of publication, we are still looking to fill the CAPC Chair position. Please contact a member of the Executive Board if you are interested in serving in that capacity.

The Executive Board made several new appointments during our March Virtual Board Meeting. CAPC will be welcoming three new members: Nariné Bournoutian (Columbia University Law Library), Peter Rolla (Loyola Marymount University), and Alex Whelan (Columbia University). CAPC will also welcome two new associate members: Allison Bailund (San Diego State University) and Julia Palos (Ball State University). We are also excited to announce that Rosemary Groenwald (Mt. Prospect Public Library) will serve as the first ever OLAC Representative to the CaMMS Subject Analysis Committee beginning in July.

With the cancellation of ALA Annual, we unfortunately are unable to meet together in person this year. However, I am excited to report that the OLAC Executive Board will be hosting the first ever OLAC Virtual Membership Meeting coming up on June 29<sup>th</sup> from 3-4 PM (EDT). Details for how to register in advance for this meeting have been sent out to several listservs including OLAC-L. We are thrilled at the prospect of using virtual meetings like this to connect with a broader audience and as a way to grow our membership.

Since March, we have been very aware of the impact that the COVID-19 pandemic could have on our OLAC 2020 Conference planning. Over the past several months, the Conference Planning Committee and the Executive Board have met numerous times to discuss all available options and the potential impact

on our members' health and safety and to our organization's financial future. In recent weeks, the Executive Board had to make the difficult decision to cancel our in-person conference in favor of moving to an online-only event. More information will be coming regarding registration and programming. I would like to give my utmost appreciation to Conference Planning Committee co-chairs Hayley Moreno and Bryan Baldus, the members of the Conference Planning Committee, and the members of the OLAC Executive Board for all of your tireless efforts to make sure that the OLAC 2020 Conference can move forward in safest manner possible.

In closing, I just want to say how proud I am to be a member of this organization. It takes a lot of time and mental (as well as emotional) energy to keep an organization like OLAC going strong for 40 years and I want to give my heartfelt thanks to any and all who have volunteered to do so.

# From the Treasurer

Jennifer Eustis



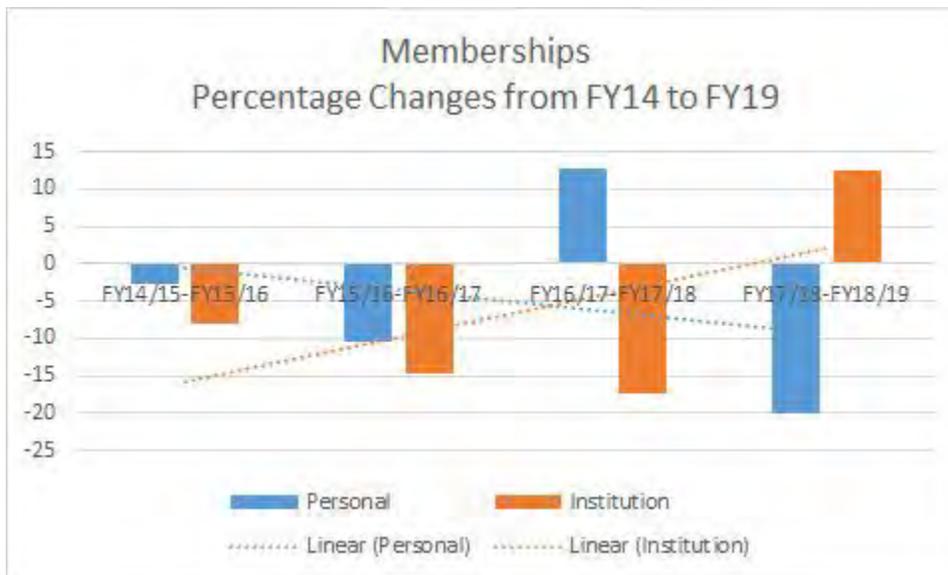
Personal Membership	204
Institutional Memberships	22
<b>Total as of 5/7/2020</b>	<b>226</b>
<b>Checking Account Balance</b>	<b>\$15,731.38</b>

Dear Members,

As the OLAC Treasurer, I would like to share a snapshot of our finances from fiscal years 2014 to 2019. I will include information on our current fiscal year at the time of writing this report and will share the final quarterly report at the close of our fiscal year on June 30, 2020.

## **Membership:**

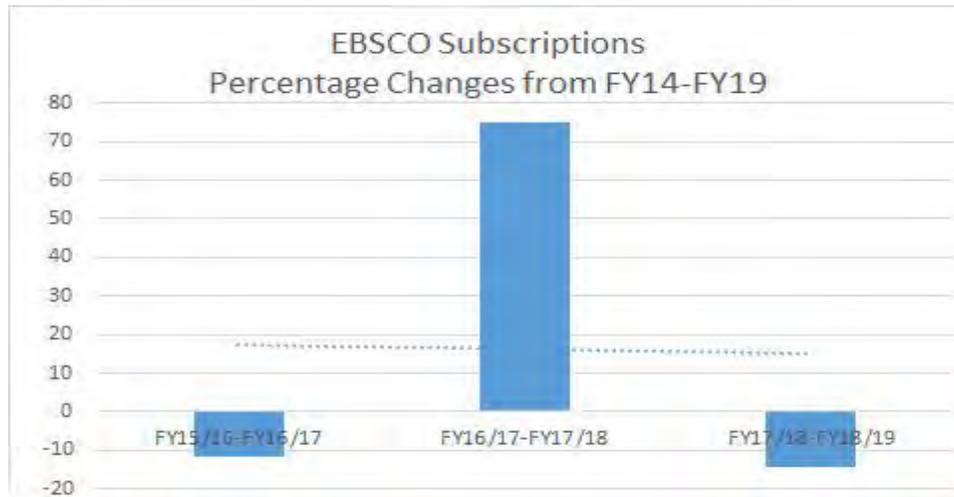
Personal memberships follow two trends. There is an increase in membership following an OLAC conference. The other trend is a continued decrease in membership.



The change from the past 2 fiscal years is significant. Our current number, 204, is another drop in the total number of personal memberships compared to last year. Though institutional memberships increased last year, the total has decreased returning to a downward trend.

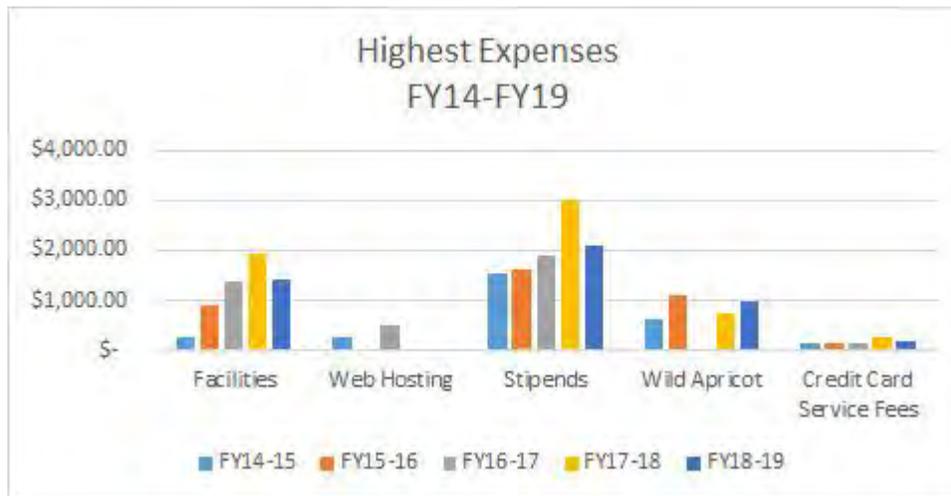
Our EBSCO subscriptions reflect the trends of membership. This fiscal year, OLAC received \$450 in

EBSCO subscriptions. This represents a significant decrease from last fiscal year and is less than the EBSCO subscriptions received in fiscal year 2014.



**Expenses:**

Our highest expenses tend to be facilities, stipends, web hosting, and our Wild Apricot subscription. Web hosting fees have increased noticeably. Last year, OLAC paid \$752.08 for a 3-year plan that included a 15% discount on the original fee. In 2017, that cost was \$518.98.



Facilities include room rentals and equipment such as microphones and a/v. The subscription fee for our membership platform, Wild Apricot, has also leveled out to a yearly subscription that is close to \$1000/year subscription. These expenses depend on a number of factors. More than likely, we will see

significant changes with facilities, web hosting, and stipends in the next few years.

### **OLAC Conferences Expenses:**

Typically, finances for OLAC conferences are in a different account than the OLAC general account. There is some bleed over into the OLAC quarterly reports, but this has not been consistent. I would like to highlight that for the 2017 OLAC conference, the Conference Account Summary recorded a personal donation to cover costs. The 2014 OLAC conference included additional end-conference donations to cover conference costs. As you know, the 2020 Conference Planning Committee is hard at work. I am thankful that we have an excellent group at the planning helm that is cognizant of the stresses and hardships our current situation presents.

### **Going Forward:**

At the end of the fiscal year, the Treasurer provides an estimate for the next fiscal year. We have all heard discussions on how to navigate this new normal. Frankly, I am struggling to provide an estimate of income and expenses. With that in mind and the reality that there are many unknowns, I would err on the side of caution.

### **Membership:**

The number of OLAC memberships has been gradually decreasing. I see this trend continuing.

- My question is how will the 2020 OLAC Conference affect our numbers?
- After conferences, membership experiences an uptick. Will this uptick be enough to counterbalance the overall decrease in membership?

I would urge all of us as OLAC members to think of ways to grow and sustain our membership.

### **EBSCO Subscriptions & Institutional Memberships:**

The overall trend is a decrease in institutional memberships and the number of those negotiated through EBSCO.

- What are the benefits to institutional memberships in relation to individual ones?

### **High Expense Categories:**

Facilities and stipend expenses have been high because of in-person meetings for ALA Annual and Midwinter. This year we spent \$2244.56 on facilities, stipends, and the Board dinner combined which reflects activities at ALA Midwinter. Had the ALA Annual Conference taken place in Chicago, that amount would probably be double. Because of the current pandemic, we will likely see financial repercussions for years to come, most notably in terms of travel for professional development.

- What are our options with potential low turnout to our meetings at the ALA Conferences along with a lower source of income, i.e. a decrease in membership?

Our two over high expenses are web hosting and our membership subscription for Wild Apricot. If the trend continues, our web-hosting fee will most likely increase when this comes due in the fiscal year

2021/2022. Our Wild Apricot subscription has been stable for the last two years but is to date our highest fee and will potentially increase.

- Is there a way to leverage this membership platform more effectively?

**Other Recurring Expense Categories:**

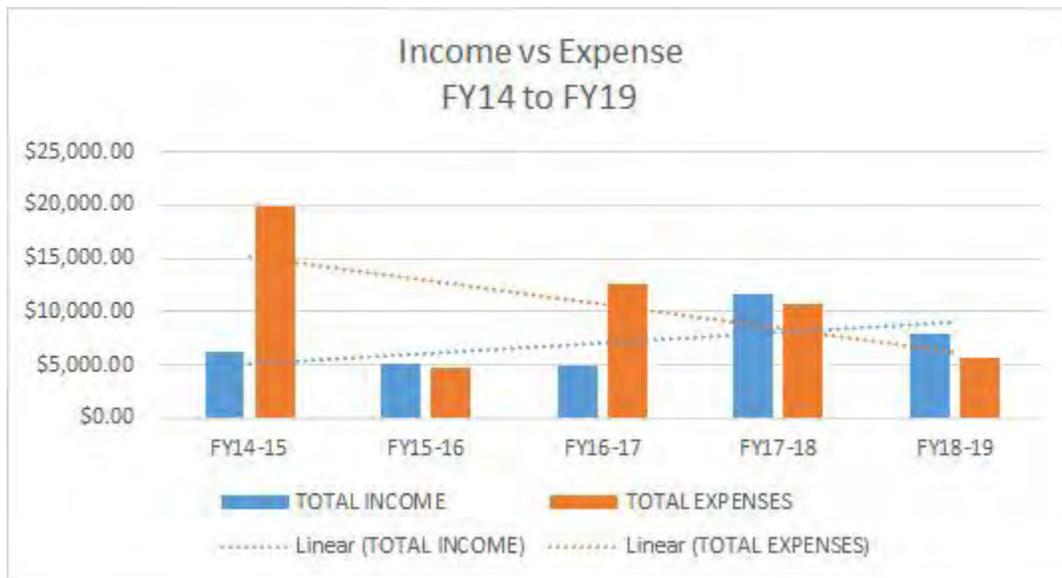
These expenses include the fee for maintaining our Archives, the ALA Affiliate fee, the subscription to Your Need a Budget among others. These fees have remained stable since 2014. They roughly amount to \$1500 / year.

**Yearly Overall Estimated Expenses:**

Our yearly expenses that we know of in terms of how they increase and how they are needed to run OLAC are: other recurring expenses listed above, web hosting fee, Wild Apricot membership subscription, and administrative fees. It is estimated that these expenses are respectively \$1500/year, \$334/year, \$1000/year, \$200/year or an estimated combined expense of \$3034/year. I did not include stipends and facilities as this varies considerably depending on a number of factors such as the pandemic.

**Income versus Expenses:**

Our income relative to our expenses has been leveling out since FY2014. This is good news, as we want a balance between our income and expenses. However, our expenses exceed our income in conference years, counting only the 2014 and 2017 conferences. We need to seek a balance between our income and expenses for all years independent of whether there is a conference that year or not. On one hand, OLAC finances are doing better than previous years here. On the other, OLAC membership is declining and with that our income.



## From the Secretary

*Nicole Smeltekop*

### **OLAC Executive Board Virtual Special Meeting**

**23 March 2020**

**1:00-2:00 EDT**



Present: Matt Burrell, Ann Kardos, Hayley Moreno, Thomas Whittaker, Jay Weitz, Jennifer Eustis, Mary Huismann, Jeremy Myntti, Jessica Schomberg, Marcia Barrett, Bryan Baldus, Kristi Bergland

### **2020 OLAC Conference**

See Hayley's email of 3/19 Re: Conference and the COVID-19 pandemic Local Arrangements Committee met last week to talk about marketing. There are concerns about the sensitivity of promoting the conference right now. Conference-related columns in the March newsletter have been updated. Workshop presenters & speakers have been arranged. Posters & lightning talk planning can be done later, if necessary. There is also the concern about the hotel and travel arrangements. Will the hotel have us pay a cancellation fee? Can we have a backup plan? What about a virtual conference?

The Board has decided that now is the time to move to a virtual conference. This might help with our number of attendees as well as planning. Hayley will investigate this as well as speak to the hotel. A banner message will be added to the Conference website indicating that even with a lot of unknowns we are thinking about this and our conference. Hayley and Bryan will work on a message for both the website and listserv. This provides the planning committee time to re-evaluate in light of a virtual conference which includes registration rates, stipends, technology, etc.

There is already a lot of information online on virtual conferences, including [How To Run a Free Online Academic Conference: A Workbook \(version 0.3\)](#).

### **OLAC Meetings at ALA**

As far as we know, the ALA Annual Conference is still on track to occur. All options are on the table. The CAPC meeting will have to be online – Jessica is high risk. Perhaps ALA will rethink things if enough people back out. Universities are not allowing people to travel. Are there implications going forward if we do not meet at ALA? Thomas will contact ALA programming and get more information on implications if we do not attend and virtual meeting options.

### **MOUG-OLAC Screencast Task Force Update**

See the [OLAC-MOUG Screencast Task Force Report to MOUG](#). The recommendation is to get a deluxe subscription to Screencast-o-matic for \$18/year. MOUG will pay the \$18 and invoice us for half of that. The Board accepts this recommendation. Thomas will contact the president of MOUG and copy Jennifer to figure out reimbursement process.

### **CAPC Appointments**

The Board reviewed applications for CAPC positions and made five appointments.

### **OLAC Executive Board Special Meeting with the OLAC 2020 Conference Planning Committee 6 May 2020**

**4:00-5:00 PM (EDT)**

**Present:** Mary Huismann, Jennifer Eustis, Jeremy Myntti, Katharine Leigh, Morris Levy, Thomas Whittaker, Hayley Moreno, Autumn Faulkner, Kristi Bergland, Jay Weitz, Bryan Baldus, David Prochazka, Sevim McCutcheon, Peter Lisius Roman Panchyshyn, Ann Kardos, Marcia Barrett

Hayley called the meeting to order at 4:01

#### **Membership survey**

Autumn has developed a survey to assess how many members are interested in a virtual conference. The conference planning committee is seeking board approval before sending the survey out. The survey would open transparency about these issues to the membership. Would the survey results be helpful in negotiating with the hotel? We are not sure, but we can see what the results are. Hayley will send the survey to the Board for review and then send it to OLAC members. Deadline for survey responses will be a week to start. We will extend the deadline if there is a low response rate.

#### **Hybrid Conference**

A hybrid (in-person and virtual) has potential and should be explored a bit more. We would need to assess costs, etc. There is no software platform to purchase; OCLC would gift WebEx or Zoom. This would apply to an online only conference as well.

#### Attendance

There is concern over people's ability to attend both for personal health concerns and for professional development funds availability. Many institutions are not allowing travel for 2020-2021. We are also

concerned that we may be siphoning off in-person attendance by offering a virtual option. There could be issues with West coast attendance due to the time difference.

### Fees

Having an online component to the conference may detract people from attending in person, but our online conference registration could help with hotel fees for the lost revenue from rooms not filled. In-person Conference registration includes meals, so perhaps should not be the same as online attendance. There was a suggestion for a slight reduction in registration for online attendance. The 2020 Exchange Conference is offering 12 hours of sessions, with registration at \$250 for non-members and \$195 for members. Registration costs for the OLAC Conference is currently \$280 for members. There was a suggestion to keep the registrations the same since the registrant will not have to pay for travel.

### Speakers

If we have a hybrid model conference, what do we need from speakers to make it viable? Code4Lib had local presenters be there physically and others presented virtually. There is a concern that if speakers are mostly remote, it may not be worth people traveling for the conference. On the other hand, some feel that we should not require speakers to attend in person.

If we have an online only conference, we will only need to cover speaker honorariums, and perhaps scholarships, since the online platform will be covered by OCLC.

### Hotel discussion

If we cancel the conference in Dublin, we will have to pay the cancellation fees now and would be credited that amount towards a future conference. We will still have to pay a cancellation fee to move the conference to October 2021. We do not have the funds in our accounts to cover the cancellation fees. Our membership is also going down while costs are going up. With food and presentation rooms at OCLC Headquarters, there are no cancellation fees for those components if we need to move the conference entirely online. Cancellation fees are only for hotel obligations.

If there is a government mandate against travel - either federally or in Ohio - we would be able to cancel without penalties. If there are travel restrictions in potential attendees' home states, it does not affect the hotel contract. If social distancing guidelines are still in place, that affects the number of people allowed in a training room.

Thomas recommended reducing the block of rooms if possible, since we anticipate having less people attending in person. Our contract states we can change the number of rooms blocked, but the hotel has to agree to it. Hayley had brought this up with the hotel in April, and the hotel was not in favor. Another recommendation is to negotiate a ceiling on the cancellation fee, since the fees are going to go up the closer we get to the conference. Hayley will ask the hotel if this is possible.

Hayley is continuing talks with our hotel contact. Hayley assessed the landscape of conferences scheduled in October that have cancelled.

There was a suggestion for a small short-term loan to cover the cancellation fee for the hotel and pay it off with online conference proceeds. The bank credit card and online accounts have the treasurer's name on it, and we do not want to put that responsibility on the treasurer.

We decided to keep our obligations with the hotel and then move everyone online if travel restrictions are in place, and thus suffer no cancellation fees. Hayley will email the Board all the options available with costs incurred by each one.

There was great appreciation expressed for Conference planners!

Adjourned at 5:00 PM

**OLAC Executive Board Special Meeting with the Conference Planning Committee Chairs  
21 May 2020  
1:00-2:00 PM (EDT)**

**Present:** Hayley Moreno, Thomas Whittaker, Kristi Bergland, Emily Creo, Bryan Baldus, Marcia Barrett, Jeremy Myntti, Jay Weitz, Mary Huismann, Jennifer Eustis, Matt Burrell

Thomas called the meeting to order at 1:01 PM.

Survey results were shared with the Board on Monday. Only 18 people out of 126 are going to have funding and are able to attend in person. We worry that this is an indication of the numbers we will see in October. Many people are open to the conference being online, and many will have funding for online professional development opportunities. Only two people are not interested in moving to a virtual conference. A large number of people prefer a virtual conference. Survey results show travel bans at many institutions. Survey results show that it is not possible to have a successful in-person conference this year.

OLAC does not have enough money in the bank account to pay large cancellation fees. There was a recommendation to cancel the in-person conference and move the conference entirely online. Perhaps we can negotiate with the hotel to get with the 50% cancellation fee and be honest with the hotel that the organization does not have the money. Continuing with in-person planning does not make sense given the survey results show very few people would attend in person.

Paying the hotel cancellation fee will be a big financial hit to OLAC. Maybe we can fundraise or use the online conference to recoup some of the losses. Thomas and Kristi volunteered to talk to the hotel as well. Having a force measure in the contract is standard for contracts. In hindsight, we should include it in all contracts.

Most Board members are leaning towards cancelling and holding an online conference. One member advocates for postponing with the hotel until 2021. A counterpoint is that this could lead to paying more

than we originally planned, since postponement is a credit and we are not paying for conference rooms or catering through the hotel.

Thomas, Kristi, and Jennifer will call the hotel to attempt to reduce the cancellation fee and cancel the in person conference. Another suggestion is to look into a short-term loan if we need to. We have until August 16th to cancel with the hotel and raise the money for the cancellation fee. We can call Chase (our bank) about options that we may be eligible to pursue. We have about \$15K in the bank and need about \$3K for other operations.

Our financial goal for online conference fees is to cover the hotel cancellation fee to keep OLAC's finances in a stable situation. Someone suggested contacting MOUG for help to lean on their Hilton contract, since Hilton owns Embassy Suites. There was a suggestion to contact ALA for advice. We decided to talk with the local hotel first before talking to management and ALA. These options are not mutually exclusive; we can start talking to ALA and reach out again to the hotel.

We will take the following next steps:

- Thomas will send an email of ALA for advice.
- Thomas, Kristi, and Jennifer will call the hotel to ask for a lowered cancellation fee.
- We will proceed with planning a virtual conference.

The Board requested a virtual conference budget (e.g., honorariums, scholarships, cancellation fee). We will explore other virtual conference fees as a benchmark. Our goal is to break even with the hotel cancellation fees and add new revenue to the OLAC account.

Adjourned at 2:00 PM

## From the Outreach/Advocacy Coordinator

*Ann Kardos*



Greetings, OLAC!

I want to say hello from my home in Western Massachusetts. So much has changed for all of us since I last wrote to you. I am sending wishes for health and wellness to you all. This month, I would like to take this space to remind us all that OLAC turns 40 this year. I hope to show case OLAC members widely for the rest of this year.

This month, I am honoring some special OLAC members. Since we cannot gather and celebrate their achievements together this year, I hope these interviews will help us get to know them and cheer on their awesome accomplishments! Thank you to Julie Moore and Maggie Dull for participating!

I am interested in doing more interviews or writing pieces to get to know members this year. If you want to be featured in a future column in the newsletter, please email me at [annk@library.umass.edu](mailto:annk@library.umass.edu).



**Who:** *Julie R. Moore*

**Title:** *Special Collections Catalog Librarian*

**Institution:** *California State University, Fresno*

Julie is the 2020 winner of the [Margaret Mann Citation Award](#). Awarded by the ALCTS Cataloging and Metadata Management Section, the Margaret Mann Citation Award is for outstanding professional achievement in cataloging or classification through publication of professional literature, participation in professional cataloging associations, or valuable contributions to practice in individual libraries. Congratulations, Julie!!!



**How many years have you been an OLAC member? What do you think is the best thing about being an OLAC member?**

I have been an OLAC member for around 15 years. It was through the first OLAC Biennial Meeting in 2006 where I felt like I finally found my people! The best thing about being an OLAC member is being part of this wonderful family of friendly funny formats catalogers. We learn and share as we teach one another about our experiences with cataloging these special formats. The OLAC electronic discussion list is an invaluable tool to share information, as are the CAPC Best Practices guides.

**You are a special collections cataloger. What are some of the most interesting collections and items you get to work with in your position at Fresno State?**

For many years, I was a Catalog Librarian in Technical Services, and I cataloged for the Teacher Resource Center (TRC), among the many other areas of the library. I was drawn to cataloging the materials in the TRC because they were both a challenge to catalog, and they were interesting to me. Every day was like a surprise, with a mystery box sitting on my desk. At Fresno State, I have cataloged a number of interesting things...and the three-dimensional objects have become my forte, among the special formats. The Pig Lungs definitely stand out as one of the more memorable (albeit smelly) things that I have cataloged at Fresno State. (Unfortunately, they had a shelf life, and the cataloging went with them.) I have cataloged boxes of rocks, shells, meteorites, tree rounds, woolly mammoth hair, lifecycles of various critters encased in acrylic, a goat-hoofed rattle, and a menagerie of hand puppets. Of course, a discussion about cataloging three-dimensional objects would be incomplete were I not to mention Tall Paul, the "object" of my affection throughout many three-dimensional objects workshops. I have also cataloged many puzzles, games, dioramas and other materials that fall under the realm of objects.

Later, I moved to our Special Collections Research Center (SCRC), which houses many unique materials. Among the gems of SCRC is The Donald G. Larson Collection on International Expositions and Fairs, one of the largest such collections in the world. It consists of over 8,000 items dating as far back as the Great Exhibition in London in 1851. Included in this are some three-dimensional objects that served as souvenirs from the various world's fairs. We have a very exciting project (awaiting us upon our return to the library building after the coronavirus pandemic), which is to catalog some of the three-dimensional items in that collection. One of my favorite things about this three-dimensional collection are the miniatures. For example, there is a tiny telescope not even 1" long! I am looking forward to providing proper cataloging for those items.

**What are some of the important lessons you have learned as a cataloger, and what kinds of changes have you seen over the years?**

I have been a catalog librarian for over 30 years...so I have had a variety of cataloging experiences! When I first started cataloging, I was actually typing cards. I miss the whirring sound of the electric eraser, when we had to change a subject heading on an entire set of cards. (Kidding!)

**Lesson #1:** A sage cataloging mentor and friend, Jay Weitz, OCLC, has a wonderful presentation series title (and I have become quite well known for grabbing his quotes and running with them.). This particular series of presentations is "Cataloging Defensively." Please catalog

defensively. Of course, if you get into a bibliographic wreck it can usually be untangled...but it is better to avoid the wreck to begin with!

**Lesson #2:** Think critically, and keep your own cataloger's judgment close by. Just because you *can* do something, does not mean that you *should* do it! In a couple of situations, I found myself being too eager to figure out a way to make something happen with cataloging in order to please an overly ambitious colleague. With your good cataloger's judgment, feel empowered to protect the integrity of the catalog.

**Lesson #3:** In cataloging, change is inevitable; therefore, learning is continuous. It is important to keep up with learning new trends, while keeping cataloging values in mind. Our cataloging rules and tools change. The cataloging system that you are currently using will always change. Do not stray too far from national cataloging standards in order for the cataloging records to index and display properly in your particular system, because another system will be coming right around the corner. (My average has been a new library management system approximately every five years.) Our work changes. Three months ago, who would know that we would be in a global pandemic lockdown working from home? I find myself cataloging many more electronic resources, such as oral histories, these days. I recently taught a program on how to catalog three-dimensional objects via Zoom. There is always something new to learn!

**Lesson #4:** "Do Not Agonize!" These are more wise words from Jay Weitz that he often says during his workshops. For me, it has become a mantra. The irony, of course, is that most great catalogers actually spend quite a bit of time agonizing! A little agonizing is a good thing, but you have to come to a decision.

To summarize, catalog defensively and hopefully you will not end up in a bibliographic wreck! Think critically, and use your own good cataloger's judgement. Change is inevitable, so roll with it and keep learning. Above all, do not agonize! (Well, do not agonize too much!)

#### **What is an interesting fact about you, or something cool you would like to share?**

I was born and raised in Indiana, so I am a Hoosier at heart. I have cataloged in libraries across the country in Florida, Alaska, New Jersey, and California. In each place, I have learned all about the local cultures, including their fascinating special collections.



# Congratulations!

**Who:** *Maggie Dull*

**Title:** *Head of Metadata Strategies*

**Institution:** *University of Rochester*

Maggie is the 2020 winner of the [Esther J. Piercy Award](#). This award recognizes the contributions of those in library collections and technical services with no more than 10 years of professional experience who have shown outstanding promise for leadership.



Three cheers to Maggie!

## **How many years have you been an OLAC member? Why did you choose OLAC?**

Over four years. I joined shortly after moving to the University of Baltimore, where I was the Cataloging and Metadata Librarian. At UB, I was tasked with helping to make our video and board game collection more visible and accessible through our catalog. While I had some experience cataloging DVDs (thanks to the OLAC guidelines!), this was a new frontier for me. As a lone cataloger, I needed a community of practice to learn from, and OLAC was exactly what I needed at that time. OLAC tackles the more challenging materials that catalogers are tasked with providing access to, materials that are often unique or in high demand. My library users benefit from my ability to engage with OLAC and the talented and generous folks who make up the membership. Though I'm now spending more of my time managing than cataloging, I remain a member of OLAC because of that community and my desire to see it continue to thrive.

**You are a metadata strategies librarian. What is one of your favorite current projects or what is something you are working on that you are passionate about?**

My current title is Head of Metadata Strategies. I oversee the Metadata Services department, a team tasked with all of the cataloging and metadata work at RCL [River Campus Libraries]. I explain our work to others in the library and at the University that we “make things findable.”

Thinking about my work as “making things findable” is at the heart of one of my favorite projects, which I’m calling Metadata Outreach. Metadata Outreach leverages the experience and expertise held by Metadata Services, particularly in information organization, metadata schema, and controlled vocabularies, as a way of building and strengthening our engagement within the University community. It allows us to use our proficiency in solving information-based problems to empower our community to recognize and tackle their information-based or metadata-based challenges. This work ranges from liaising with individual faculty members to participating in University-wide initiatives. My colleagues in our Digital Scholarship Lab reach out to my team at the start of any new faculty project so we can consult on any metadata questions, particularly for digital collections. I routinely participate in domain modeling projects as part of the University of Rochester’s data governance program--how do you define and describe a faculty member, or a student, or a location? Just this week I helped our Institutional Research folks implement a controlled vocabulary in our new research tracking system.

This project is straight-up fun to work on. I love getting to think about so many different types of problems or materials or projects. I’m learning more about different schemas and systems, well beyond what I would get to see in our normal work. I’m also learning so much about our faculty and the University as a whole. It’s a great way to make connections with people and to see how the library impacts teaching and learning on so many different levels.

**What kinds of exciting challenges do you see facing tech services departments in the next few years?**

We are already seeing a blurring of lines between what I consider the traditional roles in tech services. In my own institution, which has a history of a structure not only based around functions such as acquisitions or cataloging, but also serials versus monograph, our move to a new ILS means that we are having to rethink some of our workflows and how things flow between staff. Much more can be accomplished without as much human intervention, and I’m excited to see how our workflows change and the possibility of staff having the space to cross-train or take on new processes or projects. There is still so much in metadata work that requires a person, that requires human inferences or discernment, and that’s something we cannot lose sight of. Our turn towards the digital doesn’t mean that there’s less work for people. If we are to create robust digital collections or if we want to bring out our hidden and unique collections, we need staff with metadata skills, with subject analysis skills, to accomplish that.

**What inspires you about your current job and/or working with metadata in general?**

For both, it’s people.

I adore the team I have in Metadata Services at RCL. We migrated from Voyager to Alma in July 2019 and that’s been such a journey for us. Every day I’m awed by their creativity, their patience, and their determination to provide the best possible access to our collections for our users. As I’m writing this,

we're in the middle of the COVID-19 pandemic and we're all working remotely, away from each other and our collections. I miss them and I am so looking forward to getting back to work with them soon.

My work with Metadata Outreach means that I'm getting to interact with and learn from so many different people at the University, well beyond anything I experienced while working at a reference desk or as a departmental liaison. I love solving problems, which is what drew me to cataloging and metadata work in the first place. What keeps me in metadata is getting to solve problems with other people, to learn from them and with them, and to see the impact of the work we do.

**Do you have any pets? Would you like to share their names and a fun anecdote?**

I have two kitties, Ollie and Meeps. We got them last August--they were abandoned but now have a very excellent home in which to play with mouse toys, boxes, and the "red dot." Meeps is so-called because she can't really meow, and instead makes a tiny sound like "meep...meep!" Ollie is short for Oliver, as in Twist. He is far more mischievous than his eponym and counts among his hobbies chewing on anything paper, including copies of "The New Yorker," printouts on my desk, and select books. His tastes currently run towards hardbacks and he found Hilary Mantel's "The Mirror and the Light" to be a particular treat.

**What does winning this award mean to you?**

It is an incredible feeling to be recognized by your peers and to be recognized by an organization, ALCTS, that has played such an important role in my development as a librarian professional. I am humbled and grateful for this.



# OLAC 2020 Conference Update

*Hayley Moreno and Bryan Baldus*



As mentioned in the President's column, the Conference Planning Committee and OLAC Executive Board have been hard at work on deciding the future of the OLAC 2020 Conference due to the health and economic concerns surrounding COVID-19. We thank everyone who filled out the survey. We read every comment and took into consideration your current circumstances surrounding the conference. The survey results solidify what many of us suspected, that an in-person conference would not be feasible for many of you. It was a hard decision for everyone involved not to move forward with the in-person event, as many resources and time had gone into having the conference in Dublin, Ohio. Even though the decision was difficult, our members' well-being is top priority, and also, we understand the difficult economic circumstances that our colleagues are facing due to budget restrictions in their organizations.

With the Board's approval of moving the conference fully online, the Conference Planning Committee is already developing a transition plan. We are currently assessing appropriate conference fees now that the event will be online and how best to provide an interactive experience even though we are no longer meeting in-person. As this transition is still being developed, we will have to open registration later than June 16<sup>th</sup> as originally planned. We hope to provide more information to the membership by the end of July. This truly is an unprecedented time for all of us, as this will be OLAC's first online conference.

We hope you are still planning to join us online as the content will continue to be stellar, and we need all of you to celebrate the big milestone of OLAC's Fortieth Anniversary. OLAC is nothing without the great people behind it and even though we will not be able to gather in person, we can still learn and celebrate together. OLAC needs your support more than ever and it's up to each and everyone one of us to help this organization continue to exist for the next forty years, so make sure to join us in October for the online conference!

Bryan and I would also like to take a moment to give a big thank you to all of our colleagues in the Conference Planning Committee for their dedication to this herculean effort. How this group of people

have stood up to the challenges of organizing an in-person event and now managing the transition to online is admirable.

If you have any questions, comments, or suggestions, please do not hesitate to reach out to your 2020 Conference Planning Committee. You can fill out the [contact form](#) or email us directly at [2020olac@gmail.com](mailto:2020olac@gmail.com).

#### Conference Planning Committee members

- Bryan Baldus--OCLC (Co-chair)
- Hayley Moreno--OCLC (Co-chair)
- Autumn Faulkner--Michigan State University
- Katherine Leigh--Ball State University
- Richard Leigh--Ball State University
- Morris Levy--Ohio State University
- Peter H. Lisius--Kent State University
- Sevim McCutcheon--Kent State University
- Roman Panchyshyn--Kent State University
- David Procházka--University of Akron

## OLAC Board Elections Results

*Jeremy Myntti (Chair) and Lihong Zhu  
2020 OLAC Elections Committee*

We are pleased to announce that Emily Creo (Head of Cataloging, Four County Library System) has been elected incoming OLAC Vice President/President-Elect, and Nicole Smeltekop (Special Materials Catalog Librarian, Michigan State University Libraries) is elected to serve a second term as OLAC Secretary.

Congratulations to both Emily and Nicole!



*Emily Creo, OLAC Vice President/President-Elect*



*Nicole Smeltekop, OLAC Secretary*

Approval of the change to Article I of the OLAC Bylaws was unanimous. This article will now read:

**Article I. Name**

The name of this organization is the Online Audiovisual Catalogers. The official acronym of this organization is OLAC.

# News and Announcements

*Yoko Kudo, Column Editor*

## **Rescheduled! Digital Directions Tucson, Now October 19-20, 2020**

Originally scheduled for April, Digital Directions will be held on October 19-20, 2020. Digital Directions provides a comprehensive overview of digital preservation, presented by information professionals with experience in the preservation of cultural heritage materials. Topics Include: concepts and standards, selection and prioritization, born digital collections, digital preservation tools, metadata, copyright, storage, preserving audiovisual collections, access, and digital preservation assessment. New registration deadline is September 28, 2020. Complete conference information is [here](#).

## **DCMI 2020 postponed - alternative virtual event announced**

DCMI 2020 Organizing Committee has taken the decision to postpone the DCMI 2020 International Conference on Metadata until autumn 2021, and is planning an alternative event for September 2020. This will be a program of virtual, invited, moderated sessions including presentations, tutorials, expert panel discussions and keynotes. More details will follow [here](#) soon.

## **2020 Scholarship Announcement from Potomac Technical Processing Librarians**

Potomac Technical Processing Librarians (PTPL) announces the availability of \$2,000 scholarships for future librarians interested in technical services. Students living or working in the PTPL membership region (DC, Maryland, Virginia) and who are currently enrolled in an ALA-accredited Library and/or Information Science program, including distance education programs, are invited to apply. Application deadline is June 30, 2020 at 11:59 PM EDT. To view this announcement and download the scholarship application, visit the [PTPL website](#).

## **OCLC's COVID-19 Resources Page**

OCLC has put together a [page](#) to collect news, advice, and resources to support the work you are already doing to sustain library services and to assist our wider communities. Included are tools that can help you provide remote access to your collection, ways to optimize your use of OCLC products and services, and means by which you can connect and collaborate with other libraries. The page will be updated as needed.

## OLAC Members on the Move

*Ann Kardos*

Welcome to our Members on the Move column! Thank you to every OLAC member for all you are doing. I know we have so many successes to share from our work during the COVID-19 pandemic that are not documented anywhere out there. I realize this list highlights only some of the wonderful work of our members.

Please reach out if you want to share something you are proud of or if I missed you and you'd like to be included in the next newsletter. You can send me an email at [annk@library.umass.edu](mailto:annk@library.umass.edu).

Narine Bournoutian (Columbia University Law Library)

- Graduated with a Master of Library & Information Science from Kent State University on May 9

Emily Creo (Four County Library System, New York)

- Elected OLAC Vice-President/President-Elect

Kathy Glennan (University of Maryland)

- Presented "String Encoding Schemes" at the PCC Joint Operations Committee Meeting on May 21

Kyla Jemison (University of Toronto)

- Co-presented and instructed at a Library Carpentry 2-day workshop hosted by Ryerson University on April 29 and 30

Julene Jones (University of Kentucky)

- Co-hosted an ALCTS e-forum entitled "Navigating the Impact of COVID-19 on Library Technical Services" from April 21-22

Ann Kardos

- Co-presented "Turn and Face the Strange: Strategies for Leading Change During a Technology Implementation" at the 2020 New England Technical Services Annual Spring Conference on April 17

Jeremy Myntti (*University of Utah*)

- Presented “Urge to Merge: Adventures in WorldCat Duplicate Resolution” at the Music Library Association Conference 2020 in Norfolk, VA

Heather Pretty (*Memorial University of Newfoundland*)

- As a member of the PCC-Task Group on Metadata Application Profiles, submitted the Final Report to the PCC Policy Committee on May 1

Jessica Schomberg (*Minnesota State University, Mankato*)

- Featured on the “Organizing Ideas” podcast, episode 20, which addressed libraries and disabilities

Nicole Smeltekop (*Michigan State University*)

- Elected to serve a second term as OLAC Secretary

Cynthia Whitacre (*OCLC*)

- Presented the OCLC Update at the PCC Joint Operations Committee Meeting on May 21
- As a member of the PCC-Task Group on Metadata Application Profiles, submitted the Final Report to the PCC Policy Committee on May 1

## In the Spotlight with... Kristi Bergland

*Lisa Romano, Column Editor*



Kristi Bergland at Hippo Lake

In July, Kristi Bergland will become OLAC President. Kristi is currently a Music Metadata Librarian at the University of Minnesota Libraries. She is responsible for cataloging music scores, sound recordings, DVDs, streaming media, e-books, manuscripts, zines, and microforms. Her recent projects include cataloging and digitizing a 19th century hymnal collection, several large scale shifting and withdrawal projects, cataloging a hip-hop collection, and creating accessible documentation for Technical Services work.

*I love that my work is always changing. I feel very fortunate to work in an environment where I get to work with a broad variety of resource types, subject areas, and languages. I am always learning something new.*

Among her favorite projects is the collaboration on digital humanities projects with faculty and students. Kristi is able to offer knowledge of audiovisual formats and metadata structures, and in return, she has learned about content and data management environments. Specifically, she is involved with a website being built to support the book “Gems of Exquisite Beauty: How Hymnody Carried Classical Music to America” by musicologist Peter Mercer-Taylor. Not only has she been able to help build the website (which includes Mercer-Taylor’s transcriptions of all the hymns in his book and aims to include sound recordings of all hymns by various choirs), but as part of the ELM Ensemble of Dexter, Michigan Kristi has been able to sing on some of the recordings as well!

And what does she enjoy most about her job?

*I love seeing the product of other people’s passions, shared with others as library resources. I am awed by the sheer variety of materials that cross my desk and the tremendous amount of creative effort, time, imagination, and passion that have gone into them.*

Probably, the weirdest item Kristi has cataloged over the years was a group of anatomical teaching models used for vocal pedagogy: human half head, vocal tract, lung model with larynx.

*It was one of my first experiences with non-print materials and made me stretch the way I thought about how to describe and analyze library materials. At the same time, it was a crash course in the limitations of “pieces” as a descriptive term.*

With all these types of materials, what has Kristi found the most challenging?

*I think sometimes finding the balance between spending time crafting individual bibliographic records and working through masses of incoming materials can be challenging. Now that updating records by batch processes has become easier and mapping relationships through linked data is becoming part of the landscape, finding that balance is becoming easier--and more interesting.*

Kristi currently supervises one copy cataloger and student. In fact, she describes mentoring the student workers and interns that have come through the department as her most important achievement. Kristi has had at least six former students go on to become librarians, almost all within Technical Services! Likewise, Kristi's first library job was a work-study position as an undergraduate at the music library circulation desk.

*It was fascinating to see how all of the scores and books were arranged and classified, and I remember being in awe over how many audio and video recordings there were and how they fit into such a small room.*

After graduating, Kristi studied in Norway for a while, despite her music librarian encouraging her to go to library school. When she returned, she went to graduate school to study music and got a job at the library cataloging music. She found this position to be a very satisfying combination of her analytical and musical skills. Kristi was fortunate to have OLAC's Mary Huismann as her supervisor and mentor, who encouraged her to attend conferences and explore librarianship as a profession, but at the time, Kristi was working on a doctorate in vocal performance and pedagogy.

*Recognizing that music and librarianship were not two different paths, but two parts of the same path, I started library school after I completed my doctorate.*

Actually, it was Mary Huismann who encouraged Kristi to attend the OLAC conference when it was held in Saint Paul in 2002.

*It was a wonderful opportunity to be introduced to new (to me) media and have the opportunity to learn about their special cataloging needs. The workshops were fantastic. I had a fangirl moment when I met Jay Weitz, and I felt like I had found my people.*

Since then, Kristi has presented poster sessions at OLAC conferences, and is currently serving on the OLAC-MOUG Screencast Task Force and the MLA/OLAC Single Use Audio/Visual Task Force. Also, she has most recently served as OLAC Vice President/President-elect this past year!

When asked if she had one piece of advice for new librarians, Kristi responded:

*Continue to challenge what you think you know about "the catalog" and how it works.*

## Profiles of New CAPC Members

### **Allison Bailund, CAPC Associate Member**

Allison Bailund performs original and complex copy cataloging at San Diego State University. She has developed procedures for cataloging special format materials, including DVDs and comic books. Allison worked with a team to perform extensive research on comics cataloging practices. Documentation of that research for the project sponsor, the Comic Book Legal Defense Fund, became an open-access publication, *Comics-Start Here*. In her position at San Diego State, she has created and updated PCC name authority records through a NACO funnel project. In addition to traditional cataloging, Allison has done metadata work in an intern position with the Law Library of Congress. Allison received her MLIS from the University of Washington.

### **Nariné Bournoutian, CAPC Member**

Nariné Bournoutian is Head of Continuing Resources and Collection Maintenance at Diamond Law Library, Columbia University. She also volunteers for the XFR Collective, an organization which partners with individuals and organizations to provide low-cost digitization and to develop sustainable models for managing and providing access to audiovisual materials. As a Transfer Volunteer, Nariné transfers analog audiovisual material to digital formats, refines user-provided metadata, and ingest files and metadata into the Internet Archive. She received her MSLIS from Kent State University.

### **Julia Palos, CAPC Associate Member**

Julia Palos is Head of Monograph Cataloging at Ball State University where she manages copy cataloging personnel and workflow for digital, print, and multimedia materials, in addition to providing original cataloging for a wide variety of formats. In previous positions, she has performed original cataloging of board games and provided metadata expertise for digital projects. Julia has been an active participant in a number of ALCTS and NASIG committees and has made presentations on open educational resources and institutional repository metadata. She received her MLS degree from Indiana University.

### **Peter Rolla, CAPC Member**

Peter is Catalog Librarian at Loyola Marymount University where he catalogs library materials in all formats, with primary responsibility for serials, video recordings, sound recordings, and electronic resource. He has extensive experience in original cataloging, including eight years at two Program for Cooperative Cataloging libraries, and has served five years on ALA's Committee on Cataloging: Description and Access, including service as chair. Peter received his MLIS from Simmons College.

### **Alexander Whelan, CAPC Member**

Alexander Whelan is the Time Based Media Metadata Librarian at Columbia University Libraries where his cataloging spans all aspects of describing audiovisual resources. Alexander primarily does original cataloging for non-print formats that Columbia plans to digitize and publish online, including oral history audio recordings, archival audiovisual materials, digital images, and more. In addition to original cataloging, he remediates legacy MARC records in Columbia's library system and in OCLC, allowing Alexander to become a regular NACO contributor to the LC Name Authority file. His interest in non-print cataloging dates back to an internship at the New York Public Library creating minimal catalog records for 16 mm film prints. Alexander received his MSLIS from the Pratt Institute.

# Report on the OCLC Global Council Virtual Meeting

*John DeSantis*

The annual OCLC Global Council meeting scheduled for late March 2020 was cancelled due to the Coronavirus pandemic. Instead, Global Council held a 3-hour virtual meeting on March 24. One of the outcomes of that meeting was the election of two new members to the Board of Trustees: Shirley Chiu-wing Wong, a current Asia-Pacific delegate, and Anja Smit, a former longtime Europe, Middle East, and Africa delegate and former President of Global Council.

In addition, an Americas Regional Council virtual meeting took place on April 20. Global Council also held two roundtable discussions on how libraries in various regions of the world are coping with the COVID-19 crisis.

Because of the uncertainty which libraries are now facing, Global Council will not be holding elections for new delegates this year. Instead, departing delegates were asked to extend their terms for another year. This means that OLAC will continue to be represented on Global Council by John DeSantis through November 2021.

Unfortunately, OCLC made the decision to cancel the Americas Regional Council (ARC) Library Futures Conference for 2020, following cancellation of the 2020 Europe, Middle East and Africa (EMEA) Regional Council Conference. Currently, the Asia-Pacific Library Futures Conference is scheduled to take place mid-November of this year in Auckland, New Zealand.

# News from OCLC

*Jay Weitz*



## **OCLC Products and Services Release Notes**

Find the most current release notes for many OCLC products and services as well as links to data updates and to dynamic collection lists at [https://help.oclc.org/Librarian\\_Toolbox/Release\\_notes](https://help.oclc.org/Librarian_Toolbox/Release_notes). Included are CONTENTdm, EZproxy, Tipasa, WorldCat Discovery, WorldCat Knowledge Base, WorldCat Matching, WorldCat Validation, WorldShare Acquisitions, WorldShare Circulation, WorldShare Collection Evaluation, WorldShare Collection Manager, WorldShare Interlibrary Loan, WorldShare License Manager, WorldShare Record Manager, and WorldShare Reports.

## **WorldCat, Cataloging, and Metadata**

### ***WorldCat Validation Updates***

The long-anticipated updates to the validation rules for MARC Authorities began to be rolled out in March 2020, as announced in the [WorldCat Validation Release Notes, March 2020](#). This is in coordination with the Library of Congress (LC) and all of the Name Authority Cooperative (NACO) nodes and when completed will cover most MARC Authority updates going back to 2014. As the first step in bringing OCLC-MARC Bibliographic Encoding Levels (Leader/17) into closer alignment with those defined in MARC 21, you now have wider latitude in Encoding Level choice when creating new records or editing existing records. There are additional details in the [WorldCat Validation Release Notes, April 2020](#).

## **Delivery Services**

### **COVID-19—We're in This Together: Continuing to Manage Your ILL Services**

Over the last few weeks, everyone's had to make many adjustments—to both our work and home lives. We truly appreciate your commitment to serving your patrons and your suggestions on ways to continue ILL services at a time when physical collections are less accessible, or perhaps not at all. Your engagement and partnership have resulted in several initiatives, which are summarized below.

- **Managing your library's ILL services during the COVID-19 crisis.** This session offered useful information to help your ILL department navigate these challenging times. Meg

Atwater-Singer (University of Evansville) and Meg Massey (Penn State University Libraries) joined us to share the adjustments their libraries were making.

- [Watch the recording](#) (90 minutes).
  - Read notes for slides 70-81 (there were some audio issues) [here](#).
  - [View the full slide deck](#).
- **Reason for No (RFN) = Preferred Delivery Time Not Possible.** Many of you suggested the community use a consistent RFN for tracking and reporting the number of requests impacted by the COVID-19 crisis. This [News post](#) on the OCLC Community Center\* describes the use of Preferred Delivery Time Not Possible for materials you're currently unable to supply.
  - **Profiled Groups ACOV and BCOV and Days-To-Respond indicators.** Two new profiled groups help you identify libraries that can supply electronic documents (ACOV) and whole e-books (BCOV). Setting your library's Days to Respond for loans provides a visual cue to other libraries about what you are able to supply: 16 days indicates you can supply copies from both print and electronic holdings; 20 days indicates you can provide copies from your electronic collections.
    - For a video tutorial that demonstrates two workflows for using ACOV and BCOV profiled groups, setting Days To Respond, and adjusting Deflections, please go to this News post on the OCLC Community Center\*.
    - To add or remove your library from ACOV or BCOV, complete [this short form](#).
  - **ILL professional development: Recorded webinars and on-demand training.** Some of us may have extra time to devote to learning and professional development. [This News post](#) on the OCLC Community Center\* lists the most popular ILL sessions from the past year. Also, [OCLC training materials](#) are freely available.

\*Note that some materials referenced are available from the OCLC Community Center. All WorldShare ILL, Tipasa, and ILLiad users have access to the Community Center. If you are not sure of your WorldShare credentials that are needed to login, click [here](#).

And as always, please contact OCLC Customer Support ([support@oclc.org](mailto:support@oclc.org)) if you need assistance or guidance.

### **Help Crowdsource the Safe Return of ILL Physical Items**

Interlibrary loan is the embodiment of sharing on a global scale. When COVID-19 hit, nearly 400,000 physical items were on loan to 5,674 libraries via the WorldShare ILL network. As these libraries begin to reopen, ILL professionals need to know if, and when, to send items back to their home libraries. If items are mailed to libraries that are not open and able to receive them, there is a higher probability they will be lost or damaged, or libraries will incur additional fees because items are undeliverable. Help crowdsource the safe return of ILL physical items. At the request of the ILL community, and to support

this urgent need, OCLC is providing an easy way for you to signal when it is safe to mail physical items back to your library.

1. Please add your library to the crowdsourced list: [oclc.org/mailform](https://oclc.org/mailform).
2. Update your library's status over time by following the instructions you will receive in your confirmation email.
3. View the status of all libraries: [oclc.org/mailstatus](https://oclc.org/mailstatus).

Special thanks to [OCLC SHARES members](#) for early identification of this need and helping to make it better. Here at OCLC, we are committed to helping you and your library through these challenging times. Check out the [Reopening Archives, Libraries, and Museums Information Hub](#) and the [COVID-19 Information and Resources](#) for access to all of our initiatives.

## **Management Services**

### **University of Roehampton Selects OCLC's WorldShare Management Services**

The [University of Roehampton](#) has selected OCLC's [WorldShare Management Services](#) (WMS) as their new library services platform to improve workflow efficiencies and the user experience. An advanced, cloud-based library services platform, WMS integrates electronic and print resource management workflows into one interface, helping to provide library users quicker access to electronic materials. Including hundreds of standard reports and the ability to create custom ones, WMS provides data to improve library activities and track key metrics used in the decision-making process. The University of Roehampton initially consisted of four teaching colleges, the first one dating as far back as 1841. In 2004, Roehampton was granted independent university status after a four-and-a-half-year federation with the University of Surrey. They opened their new state-of-the-art library in 2017 with more than 350,000 books and 1,200 new study spaces.

### **EZproxy 7.0.16 Available**

EZproxy v7.0.16 was released on, 9 April 2020. This maintenance release builds on our recent release of EZproxy v7.0 and includes:

- OpenSSL 1.1.1f (released 31 March 2020) for improved security.
- Fix for an issue that caused EZproxy to fail to start on Windows systems.
- Fix for an issue that prevented EZproxy from accessing system randomness (entropy) on some Linux systems.

The [EZproxy 7.0 release notes](#) have been updated to reflect these changes. Detailed information about EZproxy v.7.0 was also shared in our recent [EZproxy Product Insights session](#). Stand-alone EZproxy customers can download the new version [here](#). EZproxy hosted customers will be notified when their site is scheduled to be updated. If you missed reviewing the improvements included in the past two

releases, here are some quick reference resources for you: [September 2019 Release of EZproxy v.6.6.2](#); [May 2019 Release of EZproxy v6.5.2](#). OCLC will end support for EZproxy's Proxy by Port option on 30 September 2020, due to its incompatibility with many popular e-resource websites. Customers currently running Proxy by Port may continue to do so for the time being. After 30 September 2020, customers will need to enable Proxy by Hostname in order to receive support from OCLC. Proxy by Hostname will help ensure seamless access for your library's e-resource subscriptions. For more information, please see [Migrate to Proxy by Hostname](#) or contact [OCLC Support](#).

## **Member Relations, Advocacy, Governance, and Training**

### **Record-Setting Learning on WebJunction**

March and April 2020 saw a record-setting spike in WebJunction Course Catalog usage (650% increase in users and 1,791% increase in hours spent learning). In fact, we had approximately as many learners in WebJunction's catalog in the month of April alone as we had during all of last year. WebJunction's director, Sharon Streams, shares in a recent OCLC [Next blog post](#), additional details about this surge in activity and WebJunction's 10 most engaged online learning topics during COVID-19 library closures. As many of you are new to the [WebJunction Course Catalog](#), we'd like to extend a warm welcome and point out our [Help and FAQ](#) information, which provides additional tips for accessing courses and webinars.

### **COVID-19 Research Partnership on Safe Handling, Reopening Practices**

The [Institute of Museum and Library Services](#), together with OCLC and [Battelle](#), announced a new collaboration to support the nation's libraries and museums as they consider safe reopening practices in light of COVID-19. Each year, people visit public libraries over 1.35 billion times, in addition to the approximately 850 million annual visits to American museums—the latter of which alone is more than the attendance for all major league sporting events and theme parks combined. While most museums and libraries' physical spaces are currently closed to the public, some are already working with local health officials to compile plans on when and how to safely reopen. IMLS, the primary source of federal funding for museums and libraries, OCLC, a global library technology and research organization, and Battelle, a not-for-profit global research and development organization, have come together to help identify and respond to the needs of collecting institutions. Other federal contributors include the Smithsonian, the Library of Congress, and the National Archives and Records Administration. IMLS took initial steps to help identify and respond to the needs of collecting institutions several weeks prior. On March 30, the agency hosted a webinar with the Centers for Disease Control and Prevention; the [recording](#) is available on the IMLS website. IMLS, OCLC, and Battelle will also engage a steering committee drawn from the museum and library fields with the goal of understanding and mitigating the impact of the virus. Together, they will help support the curation and development of information on how to handle materials, training, and cleaning in support of safely reopening and sustaining operations under a COVID-19 reality. As the national emergency has intensified, so has the concern over the handling of paper- and plastic-based, circulating, and the other types of collections and interactive

exhibits managed by libraries, museums, and related organizations. On 2020 April 13, [IMLS announced plans to distribute \\$30 million in CARES Act funding](#) to all U.S. states, territories, the District of Columbia, and the Freely Associated States to help communities address the digital divide. This followed the agency's [April 6 release](#) of new flexibilities for its nearly 1,300 open awards to provide relief for staff salaries and other pandemic-related operating expenses.

### **OCLC's COVID-19 Page to Help Libraries Serve Communities during Pandemic**

[OCLC's COVID-19 page](#) brings together timely information, valuable resources, and opportunities for online discussion and instruction to help library professionals continue to serve their communities during the pandemic. The COVID-19 resource page offers options to provide remote access to library collections, optimize OCLC products and services, and connect and collaborate with other libraries. Resources available on the page include:

- Information to guide library professionals through [options available to modify OCLC services](#) if necessary.
- A growing list (<https://www.oclc.org/content/dam/oclc/covid-19/COVID-19-Partner-Content.xlsx>) of freely available content, including recommended options to access this content through OCLC services, [made accessible by OCLC partners](#).
- A COVID-19 Discussion Board available on the OCLC Community Center to help OCLC customers share information, ideas, and best practices about how they are responding to the pandemic.
- An evolving [list of resources](#) from WebJunction, including examples of how libraries are managing the COVID-19 crisis, links to other library-specific resource compilations, and relevant events.

Visit the [COVID-19 resource page](#) for updates and additional information.

### **Online Learning Opportunities**

Many library staff are in communities that have closed their buildings to protect both the staff and community from the spread of the coronavirus. In the last month, we have seen unprecedented interest in the [WebJunction Course Catalog](#), with learners using time to pursue professional development interests. With courses on topics ranging from Collection Management to Marketing to Customer Service, our collection of over 300 webinar recordings and self-paced courses can help strengthen your knowledge and skills.

### **Youth Programming Goes Virtual**

In the face of challenging times, library staff are getting creative by connecting to some of their youngest patrons through virtual programming. In our article, [Youth Programming Goes Virtual—Storytimes, Crafts, Teen Activities, and More](#), you'll find a range of ideas and inspiration from library staff on the front lines, sharing their expertise and helping us all to learn from each other.

### **COVID-19 Update and Online Learning Opportunities**

Libraries around the world are facing the impact of COVID-19 on their programs and services, colleagues, and community. These are unprecedented times and information is changing constantly. To

help get useful information and resources out to our library community, we have published [Libraries and the Coronavirus: Evolving Information and Resources](#), a compilation of links about what is happening in libraries and resources that can aid in decision-making.

### **OCLC, PLA Report on Strategies for Public Libraries' Response to Opioid Crisis**

OCLC and the Public Library Association (PLA) have issued [Call to Action: Public Libraries and the Opioid Crisis](#), a report that offers tested strategies to consider as libraries determine local responses to the nationwide public health emergency. According to the Centers for Disease Control and Prevention, 130 people die every day from an opioid overdose. As trusted local institutions, public libraries connect community members to credible, accurate information and services that can help support needs around substance use disorder. The call to action was informed by case study research with eight public libraries that have created community responses with local partners, as well as discussions with government agencies, public health and human services organizations, community organizations, and library leaders. The call to action encourages public libraries to:

- Evaluate local health data
- Seek community partners
- Educate staff and community members on the issue
- Consider the need for staff care
- Offer programs and services that support local needs

Even in communities where the overdose rate isn't high, the issues connected to opioids can be challenging. Opioid misuse impacts not only the individual, but also families and friends who may be seeking relevant information and resources. The OCLC-led project was supported by a \$249,714 National Leadership Grant by the [Institute of Museum and Library Services](#) (IMLS) project number LG-00-18-0298-18) to collect and share knowledge and resources that support public libraries and their community partners to address the opioid crisis. The previously released [case studies](#) and [summary report](#) feature opioid responses from libraries serving populations from 16,000 to more than 800,000 people. Documented activities and programs include training on naloxone use, access to peer navigators, author talks, film screenings, and public awareness campaigns. The project team conducted eight research-based case studies highlighting varying opioid response efforts across the US, involving the following libraries and community partners:

- Barrington Public Library; Barrington Adult Youth Team (BAY Team) (Rhode Island)
- Blount County Public Library; Blount County Recovery Court (Tennessee)
- Everett Public Library; Snohomish County Human Services (Washington)
- Kalamazoo Public Library; Recovery Institute of Southwest Michigan (Michigan)
- New Orleans Public Library; New Orleans Health Department (Louisiana)
- Peoria Public Library; Human Service Center of Peoria (Illinois)
- Salt Lake County Library; Utah Naloxone; R&R Partners (Utah)
- Twinsburg Public Library; Summit County Community Partnership (Ohio)

## **Anja Smit and Shirley Chiu-wing Wong Elected to the OCLC Board of Trustees**

On 24 March 2020, OCLC Global Council convened virtually for its annual meeting. The agenda included the introduction of candidates to serve on the OCLC Board of Trustees along with instructions for the 2020 online election. The election concluded on 17 April, and the votes have been counted. Global Council delegates have elected **Anja Smit**, University Librarian at Utrecht University in the Netherlands, and **Shirley Chiu-wing Wong**, University Librarian at The Hong Kong Polytechnic University, to the OCLC Board of Trustees. Both will take their seats on the Board in November 2020. The OCLC Global Council is elected by OCLC members to represent the global library community. They provide reflection and insights regarding the needs and issues facing modern libraries. They also elect members to the OCLC Board of Trustees. There are currently nine librarians from five countries serving on the 15-member OCLC Board of Trustees. Learn more about [OCLC Global Council](#) and the [OCLC Board of Trustees](#) on the OCLC website.

## **OCLC Research**

### **OCLC, IMLS, and Battelle COVID-19 Research Partnership Update: REALM Project Site Launches**

REopening Archives, Libraries, and Museums (REALM) is a research partnership between OCLC, the Institute of Museum and Library Services, and Battelle to create and distribute science-based information and recommended practices designed to reduce the risk of transmission of COVID-19 to staff and visitors who are engaging in the delivery or use of museum, library, and archival services. Visit [oc.lc/realm-project](https://oc.lc/realm-project) for more information on the project, research timeline, and committee members. Project updates and resources will be added to this information hub as they become available. We encourage you to [sign up](#) to receive project updates by email and/or bookmark the project page, as it will be the primary source for housing all program results and resources. You can also follow OCLC on [Facebook](#), [Twitter](#), [LinkedIn](#) for the latest project updates and join the conversation using #REALMproject.

### **New COVID-19 Discussion Board for Libraries**

To help libraries share information, ideas, and best practices about how they are responding to the extraordinary circumstances surrounding the global COVID-19 pandemic, OCLC is adding a new COVID-19 Discussion Board to the Community Center. This moderated forum is open to all OCLC members. Current OCLC Community Center members can use existing service log-ins to access the forum here: [oc.lc/covid19-discussion-login](https://oc.lc/covid19-discussion-login). OCLC members who do not currently have Community Center log-in credentials can request them here: [oc.lc/covid19-discussion-request](https://oc.lc/covid19-discussion-request).

### **New OCLC Research Update**

Explore the newest offerings from OCLC Research in the [March – May edition of our Research Update](#). This latest issue includes Works in Progress webinars on topics from A/V special collections to student

information choices, a new publication and upcoming free webinar on Public Libraries and the Opioid Crisis, resources on the latest work in linked data, blog posts on intra-campus collaboration, and more.

### **Thomas Padilla is Named One of *Library Journal's* Movers & Shakers**

Thomas Padilla, former OCLC Practitioner Researcher-in-Residence, is named one of *Library Journal's* 2020 Digital Developer Movers & Shakers. In 2018, Padilla was awarded a major Mellon Foundation grant “to further explore what it takes to develop and provide access to collections as data but also what it takes to sustainably and ethically support [their] use.” He then joined OCLC as Practitioner Researcher-in-Residence in 2019 to facilitate OCLC’s engagement with the library data science community and help inform OCLC’s research agenda. Padilla’s research at OCLC culminated in the publication of “Responsible Operations: Data Science, Machine Learning, and AI in Libraries.” Access the report at [here](#). Read Thomas’s full [Library Journal Movers & Shakers profile here](#).

# OLAC Cataloger's Judgment: Questions and Answers

*Jay Weitz, Column Editor*

## **Oblique Strategies**

**Question:** I have not been able to figure out how to narrow a search down to podcasts in WorldCat. Do you know if that's a possibility?

**Answer:** "Podcasts" (gf2011026450) is a legitimate LCGFT term, making it a logical starting place for a Genre/Form (ge:) search, which yields over 2000 hits. You could narrow that further to either sound recordings, motion pictures, or video recordings to get smaller result sets. If you want larger result sets from which to choose, you can approach things more obliquely. My guess is that many, if not most, podcasts identify themselves as such, so using the word "podcast" itself in a Keyword (kw:) or Notes (nt:) or even Title (ti:) search in WorldCat would be a fairly effective initial limiter. Material Types "nsr" for Non-Musical Recording and/or "elc" for Electronic would be logical limiters. If you want to limit to higher-quality records, you could limit to DLC/PCC, by Authentication Code (ac=) or by "/dlc" or your favorite strategy.

## **Circumstances beyond Our Control**

**Question:** I'm cataloging a trio sonata for flute, violin, and continuo. There is a heading for "Trio sonatas (Flute, violin, continuo) \$v Scores and parts." But when I paste this exact string into the 650 and try to control it, I get a message basically saying the heading doesn't exist. What's going on here?

**Answer:** The authority record you cite (sh2008113010) cannot be controlled to because of the presence of field 667 reading "Record generated for validation purposes." This is documented (pretty obscurely) in [OCLC Technical Bulletin 259R](#) on page 24. It was also widely announced at the time of the implementation back in 2014 (see for instance the [SACO discussion list archives](#), not that anyone would remember such a thing all these years later.

## **Restraining Order**

**Question:** My understanding of subfield coding in the 245 field is that once subfield \$c is entered, one may not employ any other subfield coding. So, imagine my surprise when I encountered the following in #37035396:

245 10 Violin concerto in D minor, op. 47 / \$c Sibelius. Sérénade mélancholique : \$b op. 26 ;  
Scherzo : from "Souvenir d'un lieu cher" : op. 42, no. 2 / Tchaikovsky.

And my additional surprise when I validated the record and received no error message about incorrect subfield coding. Has use of subfields after \$c changed and I'm just not aware of it, or is this in fact an error? If the latter, should the validation routine have caught it? I've consulted BFAS, and the subfield \$b above appears to be an error. The fact that validation overlooked it gave me pause, though, prompting me to seek confirmation or clarification.

**Answer:** Your understanding that in field 245 no subfielding is allowed to follow subfield \$c is correct. Unfortunately (and yes, surprisingly, I have to agree), validation doesn't check for subfield order in field 245. That is something we can think about for the future. Aside from field 245, I'm having a tough time coming up with too many other fields where such a check would be possible (although it deserves more study). Even in field 245, I'm thinking it might not be possible to get more sophisticated than "no subfielding after subfield \$c." Even that would be useful, of course.

### **The Curse of the Cursor and Other Fun Working From Home**

**Question:** Please, can I have an undo/redo button in OCLC Connexion Client? Especially when one is working from home using a ThinkPad with Windows 10, on which the cursor pretty much goes wherever it has a mind to and thinks nothing of highlighting half a dozen fields of original cataloging, ready to be wiped out with the next keystroke, just for fun.

**Answer:** The Connexion client already has not one but two "undo" buttons, either or both of which may be added to your Toolbar or be invoked through keystrokes. The first goes by the concise and elegant name of "EditCutCopyPasteUndo" and is said to "Cancel the last change made in a cell (cancels one change at a time)." Keystrokes <Ctrl><Z> or <Alt><E><C><U> will also do the same action. The button features a red arrow hooking down then to the left. The other, even more concise and elegant, is "EditCutCopyPasteCancelChanges" and is said to "Cancel all changes made to the current record since you last saved it." Keystrokes <Ctrl><Shift><Z> or <Alt><E><C><A> will perform the same action. The button features a purple arrow that arches up and then down to the left. If you go into the Connexion client Help index at "toolbar," you'll find descriptions of each of the dozens of buttons you can add to your toolbar and instructions on how to customize it. If you've been using the default toolbar, you're missing out on making your work much easier. And if a Luddite and technical idiot such as I can figure out the customization, so can you. Regarding the curse of the out-of-control laptop cursor, many of us have had similar problems. It might have to do with the presence of the touchpad right under your hands. Without meaning to, while you're typing you touch the pad and cause your cursor to move somewhere or do something unintended. Try disabling your laptop's touchpad – they're all different so I can't help you with the specifics, but you can probably search out the instructions in your laptop's help system or ask a younger friend or colleague to help. They know everything. Again, if I was able to figure out how to do it, you can, too. It was fairly simple once I found the instructions, and I've had fewer cursor problems since. If you actually use the touchpad rather than a mouse, once you figure out how to disable it, you can toggle it on and off if you want.



**The Music OCLC Users Group (MOUG) is the voice of music users of OCLC's products and services.**

Through our publications, annual meetings, and other continuing education activities, MOUG assists novice, occasional, and experienced users of all OCLC services in both public and technical services.

We also provide an official channel of communication between OCLC and music users, advocating for the needs and interests of the music library community.

A year's personal membership, including a subscription to the MOUG Newsletter, is **\$40 USD**. Institutional membership is **\$50 USD** per year. Please direct all correspondence to: Jacob Schaub, MOUG Treasurer, Music Cataloging Librarian, Anne Potter Wilson Music Library, Vanderbilt University, 2400 Blakemore Ave., Nashville, TN, 37212.

For more information, visit our website at:

<http://www.musicoclcusers.org/>