NEOS TECHNICAL SERVICES COMMITTEE MEETING -

November 26th, 2020

MINUTES

Present: Susan Jones, Chair (MacEwan), Anne Carr-Wiggin (NEOS), Myrna Dean (Concordia), Laura Somerville (Lakeland), Karina Dunn (Vanguard), Cayla Thorlakson (Vanguard), Wilmer Tenerife (Burman), Gisele Ramgoolam (NorQuest), Emily Shaw (KRS AHS), Rachel Martins (NLC), Ian Bigelow (U of A), Tara Gunsch (RDC), Amanda Wills (GPRC), Lisa Drysdale (AGL), Caroline Vandriel (Olds), Taras Kurylo (Alberta Innovates), Jolene Linfitt (Kings), Brian Stearns, (University of Alberta Cataloguing and Metadata)

Guests: Sue MacRae, MacEwan University
Amanda Nagyl, University of Alberta
Sam Popowich, University of Alberta
Abigail Sparling, University of Alberta
Kathy Williams, Lakeland College
Sharon Farnel, University of Alberta

1. **Call to Order, welcome, and introductions**
2. **Review and Additions to the Agenda:** No additions
3. **Approval of the minutes of the March 5, 2020 meeting:** Approved
   We thank Linda White (Keyano College) for preparing these minutes

OUTSTANDING BUSINESS FROM THE MARCH 5, 2020 MEETING

4. **Open Access sets (NEOS Free) and usage across NEOS – Update**
   From March 5, 2020 meeting: *Workflows needs a clear structure for having OA items loaded. The ebook team is working on a draft for NEOS Free sets and will share with the committee when it is ready. The monograph team will have a look at the draft document that is to be sent out to NEOS members. Abigail Sparling will be creating a document on ejournals and OA in the catalogue*
   Ejournals and Open Access ejournals: There is a draft but the completion of that draft and output to NEOS will come from a serials documentation group (to be formed later) lead by Abigail Sparling (U of A). **ACTION:** Serials Documentation Group

   Monographs/ebooks: Some documentation exists (such as ebook cataloguing). This will be brought back to the monographs team and an update will be provided at the next meeting. **ACTION:** Monographs Team

5. **Free Access Journals in the NEOS Catalogue Blacklight Interface – Update**
   From March 5, 2020 meeting:
   a. *Free Access links are disappearing in Blacklight from some Open Access resources. We have a better diagnosis of the problem and a potential solution (a new catalogue policy)*
   b. *Discuss a new catalogue policy for keeping (or adding) Free Access links in the 856$3 so that links appear in Blacklight (where these behave differently than in iLink). This would include, NOT removing the 856$3 links when there are institutions on the record that rely on that link to point users to their institution's access*
   c. *Maria (RDC) will have more discussions with Abigail and Ian to try to figure out if this is a technical issue with possible solutions or if it's a cataloguing issue*

   Resolved: Blacklight issue: there wasn't logic in place to display the links in NEOS blacklight.

6. **Blacklight 500 Error – Update**
   From March 5, 2020 Meeting: *In Blacklight, there is an ongoing issue, for many ebooks, with a 500 error coming up when clicking, from a results list, on a record for an ebook. (Ticket #20200129101)*

   Resolved: If the error occurs again contact U of A library help (help@thealbertalibrary.ab.ca)

7. **Document Review**
   a. **NEOS General Agreement on Shared Principles for Cataloguing and Committee Terms of Reference**

   This is an overall agreement that covers what the libraries agree to do, and the obligations of membership. It must be approved at the Director's level as it's a policy agreement (Terms of reference, once drafted, is shown to the executive committee).

   Looking for 3 or 4 people to draft a revision for the general agreement (revision has not started yet).

   The general agreement may have been incorporated and included in **Doc 1**. Suggestion: The general agreement could then be revised to point to what is in Doc 1 (and revise what is said in Doc 1). This would be a shift in responsibility as this committee drafts and approves what is in **Doc 1**.

   Request for people to work on this will be sent out via the listserv.

   b. **NEOS Technical Services Terms of Reference** (see draft revision)

   First point of Discussion: **"ensure the integrity of the NEOS Catalogue"**

Wording that better describes what the committee does will be worked on and brought back to the next meeting.

Changes made under **Reporting Structure:** all agreed on.

Second point of Discussion: Under **Key Duties and Responsibilities**, **1.** The inclusion of serials as separate from acquisitions and cataloguing.
Suggestion: change the wording to serials management.

Other changes under **Key Duties and Responsibilities**: all agreed on.

Changes made under **Composition and Appointments:** all agreed on.

Third point of discussion: Under **Meetings:** Further discussion on membership and guests is required offline for clarification (between Susan, Anne, & Ian).

Changes agreed upon above will be made and the document will be brought back to the next meeting for further discussion where necessary and approval. **ACTION:** Anne Carr-Wiggin

NEW BUSINESS

8.   Committee Member Updates (Anne Carr -Wiggin, NEOS)
No changes to membership.
Just a reminder: When your representation on this committee changes let Anne Carr-Wiggin or Susan Jones know so changes can be made in the appropriate locations. This includes changes made to generic emails.

9.   Decolonizing Description Working Group (Brian Stearns)
   a. Currently had 4 meetings
   b. Identified broad concepts that have had community consultation on which to start work
   c. Created the committee's working documents
   d. Identified and began work on a lot of the technical work (creating authority records, identifying bibliographic records that need to be modified, adding our terms with subdivisions) in the test database
   e. Divided work amongst group members

At this point things are getting set up, but this group/committee may be asked for assistance in the future with the work.

The committee extends appreciation to those who are contributing to the work of the Decolonizing Description Group.

Increasing pressure has been received from individual institutions to decolonize the catalogue. Recognizing that this work will take a long time to achieve (including community consultation, creation of new appropriate thesaurus headings, programing global catalogue and workflow changes, etc.) increases the need, now, for an acknowledgement statement that NEOS libraries can use to embed in their local institutional websites, discovery layers, etc.

f. Statement to acknowledge the colonial nature of library description
i. Discussed adding a statement to records or websites about offensive subject headings
ii. Sharon Farnel is providing some suggestions:

Put into the catalogue records and/or on the catalogue/website homepage that would describe/recognize the problems with some of the terminology and to alert people to the work that is happening here and across Canada to address these issues.

A smaller group has been formed to write some drafts (see appendix A). Work is in progress.

iii. Seeking feedback and direction from Technical Services Committee (see Appendix A)

Suggestion: directly in the records
Concerns: what records it would have to be in and how to get the statement into the records; A statement in each record could trigger negative emotions/be a negative reminder, instead have a pop up on request.

Suggestion: statement on library websites/main catalogue pages
Concerns: A single statement in one of these places, depending on where, could be missed; a general statement could be in a variety of places, but doesn't address the question when it comes up (of what is being done) which is when people are in the record.

Suggestion: Do both/all three. And they don't have to be done at the same time. Get the easier one to post up first and then figure out the rest.

Once the wording is put together and decided on the Directors will have to review.

10. Blacklight Update (Sam Popowich)

The library leadership team at the U of A made the decision to move away from Blacklight as the underlying technology for discovery. It is anticipated that they will be moving back to EBSCO discovery (EDS).

A NEOS Discovery Committee will be put together to address any technical questions or issues that may come up with the implementation of this change. A call for committee membership will go out via the Directors.

It is suggested that both the Access Services Committee and Technical Services Committee appoint members to this group.

Timeline: the switch will be sometime after the end of the winter term.

An internal committee at the U of A is being formed to work through any issues that come up with this change. They and the NEOS Discovery Committee will work together on a timeline that works for everyone. The UofA instance and NEOS instance are separate so timing does not have to be the same.

Send questions via email to Sam Popowich. The NEOS committee will explore the needs and facilitate communication, planning, and technical support for discovery for NEOS libraries.

11. **Serials survey results (Abigail Sparling)**
    a. Present recommendations formulated by working group members

       6 recommendations: <u>NEOS Continuing Resource Documentation Recommendations</u> (also in the appendix); Suggestions welcome.

    b. Call for new working group to address recommendations: will be put out on the listserv; asking someone else to be chair **ACTION:** Abigail Sparling

12. **Reminder of Sirsi report distribution (Abigail Sparling)**
    a. Reports affecting NEOS members can be accessed through the JREPORTS account.
    b. Reports such as Rem Discards. Use of this report aligns with survey recommendations:
       i. To develop guidance on managing record deletion, especially when there are outstanding serial controls or order records attached to a record where the last item needs to be deleted
       ii. To help cleanup serials records properly

13. **Follow up on discussions with LAC (Ian Bigelow)**
    a. CSH
       i. Available in OCLC
       ii. Openly available via PDF: a more accessible format along with ongoing updates
       iii. Ongoing discussions of support as open/linked data

       LAC is open to making SCH open and available but still trying to figure out how.

    b. OCLC applications
       i. Potential to coordinate reporting and applications in support of all NEOS libraries
          1. Specifically reporting the holdings of NEOS libraries to the National Catalogue of Canada, Voila, regardless of whether a NEOS library is an OCLC member or not

2. Next step will be to work with LAC to establish this reporting of collections and determine approach

14. **Local MARC fields review (Amanda Nagyl)**
    a. Seeking feedback from NEOS libraries on their knowledge and use of local MARC fields used in WorkFlows, with local being defined as MARC fields that are not accounted for in [LC's MARC manual](). An initial list of such known fields has been in [Local MARC Fields for NEOS Review google document]() with the hope that NEOS libraries can provide further input. Outcomes we wish to achieve are, a cleanup of outdated data, and common understanding around these fields.

       A message will be sent out on the listserv asking for feedback on this. **ACTION:** Amanda Nagyl

15. **PCC and UAL RDA 3R implementation timeline (Ian Bigelow)**
    a. This is just for information about implementation timelines for the "new" RDA (RDA 3R). As UAL is a member of PCC we will be following the [implementation process and timelines outlined by the PCC Policy Committee](). ("PCC will not be implementing the new RDA Toolkit before July 2022")
    b. Should this also be confirmed by NEOS?

       UAL does not have any plans to implement the new RDA on a different timeline as this.

       Do the other libraries have access to the tools, can they keep up with the training? **ACTION:** Defer this to the next meeting, giving time for this to be discussed at the individual library level.

16. **Reminder about cancellation notifications for bibmonographs@ualberta.ca (Ian Bigelow)**
    a. General reminder to let the UAL Monographs Team know ASAP if there are plans for any cancellations (or new acquisitions) for planning purposes. Between now and Dec 31st there are already a lot of cancellations planned

17. **Standing Agenda Item: Committee documentation (ALL):** Nothing New

18. **Minute Taker at Next Meeting: TBA**

APPENDIX A

NEOS Technical Services Meeting, November 26, 2020
Acknowledgement Statements Regarding Problematic Subject Headings

Many libraries have implemented statements acknowledging the problematic nature of subject headings related to Indigenous peoples and perspectives.

The NEOS Decolonizing Description Working Group would like to gather feedback and seek direction for including such statements from the Technical Services Committee.

The statements can be statements on individual library websites, statements on main catalogue pages or statements at the record level. Statements on library websites would be up to the individual library to implement, but if NEOS libraries want, consistent wording can be developed by the DDWG. The DDWG would like to consider adding statements in the catalogue and in individual records.

Some examples:
- Cataloging Lab list of library/archive statements on bias/offensive language: http://cataloginglab.org/list-of-statements-on-bias-in-library-and-archives-description/
- Temple University statement: https://library.temple.edu/policies/scrc-statement-on-potentially-harmful-language-in-archival-description-and-cataloging
- Yale statement: https://guides.library.yale.edu/specialcollections/statementondescription
- Algoma University Archives statement: - http://archives.algomau.ca/main/?q=node/30854
- Toronto Public Library has recently developed a specific statement on the term "Indians" that can be added to individual records as applicable: "594 $aToronto Public Library recognizes that the term "Indians" (used in subject headings such as "Indians of North America") is offensive to many people. Although we currently maintain these headings to adhere to descriptive standards used by libraries worldwide, we and other Canadian libraries are working to replace them with ones that are acceptable to Indigenous Peoples in Canada."

APPENDIX B

NEOS Continuing Resource Documentation Recommendations

Recommendations:
1. Review *NEOS Document 1 - Cataloguing Standards* to determine how well it captures continuing resource cataloguing and maintenance (ex. correcting/updating serial records for changes that have occured over time, creating NEOS_FREE items, updating links). Determine if updates are required.
2. Adapt, update and/or create documentation for the following record types:
   - Bibliographic Records

- o Create "coles notes" versions of major issues staff encounter supplemented by links to free standards documentation and local examples. Topics to include:
    - ▪ Major/minor title changes
    - ▪ Creating access points
    - ▪ Creating hybrid AACR2/RDA records
    - ▪ Other common changes (frequency, publisher, etc.)
- ● Summary Holdings Records
    - o Review suitability of UAL Summary Holding documentation for NEOS wide use. If suitable, adapt documentation for NEOS usage.
- ● Serial Control Records
    - o Review suitability of the following existing documentation to create a succinct guide to serial control creation for NEOS members. Where suitable adapt for NEOS use:
        - ▪ Sirsi Serial Control Manual
        - ▪ UAL Serial Control Creation documentation
        - ▪ Training/documentation in the Sirsi help portal
    - o Create specific documentation on setting up complex predictions, with examples of complex predictions already in place in the ILS
3. Facilitate online workshops and/or discussion groups specific to continuing resource topics
    - ● Start small to gauge reception and engagement
    - ● Monitor libhelp and listserv questions to prompt future session topics
4. Encourage cataloguing staff to use the NEOS-tech listserv to discuss issues/questions related to continuing resource cataloguing in order to share expertise as widely as possible
5. Develop guidance on managing record deletions (REM DISCARDS - JREPORTS) when there are outstanding NEOS serial control or order records
6. Set standard for documentation sharing and review to ensure needs are met
    - ● Will require verifying whether this already exists in the NEOS-TECH TOR