# TechKNOW

## FAST: Faceted Application of Subject Terminology—A new spin on an old standard

*by Ione T. Damasco, Cataloger Librarian
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Although the Library of Congress Subject Headings (LCSH) schema is the most widely used subject vocabulary today, its complex syntax and extensive rules for constructing headings mean that only highly trained, highly skilled catalogers are able to assign subject headings to catalog records. Furthermore, automated authority control is an issue with LCSH because there are numerous valid headings that can be established following the subject cataloging manual that have no equivalents in the existing LC subject authority file. These limitations, coupled with the growing number of electronic resources that are being included in library catalogs warrant the need for a faster, simpler way of assigning subject headings.

As a result, a research team based at OCLC has developed the Faceted Application of Subject Terminology (FAST) schema and authority file, consisting of headings derived from LCSH that are amenable to post-coordination and authority control. FAST headings are easy to use, understand, and apply, and the development of a FAST authority file at OCLC could mean widespread implementation in the future.

**New Web Page Space is Available for TS Division to Design**
http://www.olc.org/TechnicalServices.asp

The Ohio Library Council has created Web page space for the Technical Services Division. We are ready to move in, but we don't know what division members want the site to contain. What useful tools and information should be included? How can we best use this opportunity to serve you? This July the TS Division Action Council will meet and they will be discussing the contents of this space. Please send ideas, suggestions and thoughts regarding the new Web site to Roger Miller at mailto:roger.miller@cincinnatilibrary.org.

## Development of FAST

Although numerous metadata schemas such as Dublin Core have been developed to address the need for simplified descriptive access to electronic resources, particularly those available on the World Wide Web, the proliferation of such resources has warranted the re-evaluation of how subject access is provided. Based upon the recommendations of an ALCTS/SAC Subcommittee as well as broad agreement within the cataloging community, the research team has determined there are several requirements a subject schema suitable for the Web environment should exhibit:

- Simplicity, i.e. easy to use, maintain and comprehend by paraprofessionals and professional catalogers alike
- Interoperability, to ensure resource discovery across both disciplines and information retrieval and storage systems such as online public access catalogs (OPACS)
- Scalability, to ensure implementation from the simplest to the most sophisticated system

Furthermore, the Subcommittee has recommended that the metadata for subject analysis of online resources should be a combination of keywords and controlled vocabulary. Sources for controlled vocabulary are available from three different options: use existing schema(s), adapt or modify existing schema(s), or develop an entirely new schema. In the end, the OCLC research team has determined the best option for the development of a general-purpose subject schema is to adapt LCSH, which has resulted in the creation of the FAST schema.

**FAST Facets:**
Topical
Geographic
Form—Type or Genre
Period—Chronological
   or Time
Personal Name
Corporate Name
Meeting Name
Title

## FAST Facets

The first phase of FAST development has centered around the development of eight distinct facets based on the vocabulary found in LCSH topical and geographical headings. These facets have been identified as topical, geographic, form (type or genre), period (chronological or time), personal name, corporate name, meeting name, and title. Currently, the title and meeting name facets have not been included in the development process, and are slated for examination in the next phase of development. The personal name and corporate name facets at this time do not included name-title entries, and name-title entries as subjects will presumably be addressed in the next phase of development as well.

The remaining facets have been more fully developed into established headings. As with LCSH, literary warrant has been used as the basis for determining which headings should be established. In this specific case, WorldCat usage determines whether or not a FAST heading will be established. In theory, there are an infinite number of valid LCSH headings that can be constructed according to the subject cataloging manual. Establishing every possible subject permutation is not feasible, and practically speaking, not necessary. Although the FAST authority file is intended to be comprehensive, headings that have never been used in WorldCat will not be established, even if they are valid. However, FAST headings do retain the hierarchical structure of LCSH. Furthermore, the use of

subdivisions is also retained in FAST, although unlike LCSH, subdivisions can only be used with main headings from the same facet. In other words, topical headings can only be subdivided by topical subdivisions, geographical headings by geographic subdivisions, etc.

## Topical

FAST topical headings look much like established topical headings in LCSH. Topical headings in FAST are made up of topical main headings and appropriate topical subdivisions, including topical subdivisions that can be found under name and geographic headings in LCSH. However, in FAST practice, all free-floating topical subdivisions have become part of the established form of topical headings, and all multiple subdivisions have been expanded, but only to the extent warranted by existing usage in WorldCat. Individual elements within this facet have been pre-combined to the extent allowed by the Library of Congress application policy, but again only those headings that have been used in WorldCat have been established. Here is an example of an existing heading that has been established in the LCSH Subject Authority File:

Globalization—Religious aspects—Buddhism, [Christianity, etc.]

In FAST, this single heading has become several established headings:

Globalization—Religious aspects—Christianity
Globalization—Religious aspects—Hinduism
Globalization—Religious aspects—Islam

In this case, a heading has not been established for every known religion, only for those religions that have been used in this combination in WorldCat.

## Geographic

Geographic headings in LCSH are either entered directly or indirectly, depending upon their usage. Main headings are entered in direct order, such as "Paris (France)," but when used as a subdivision, place names in LCSH are entered indirectly, such as "France—Paris." In FAST, all established

geographic names are used in indirect order. First level geographic names in FAST are restricted to names from the MARC code list for geographic areas, and are far more limited than in LCSH. The geographic area code for Paris, France is [e-fr]. The geographic area code for Paris, Texas is [n-us-tx], the code for Paris, Illinois is [n-us-il], and the code for Paris, Ohio is [n-us-oh]. A search for Paris with the geographic area code [e-fr] ensures precision by limiting the results to France, excluding any of the results in the United States. By limiting first level entries to the geographic area codes, the headings are enhanced by additional specificity and the provision of a hierarchical structure.

FAST also alleviates some other searching problems associated with LCSH when it comes to place names. In LCSH, some place names appear quite differently between their direct entry form and their indirect entry form. For example, both the first level entry and the subdivision form of New Jersey are spelled out as "New Jersey," but as a qualifier the place name becomes abbreviated, as in the case "Newark (N.J.)". In this case, users must search for multiple forms of a place name to ensure a comprehensive search. In FAST, a search for Newark, New Jersey would be more precise because it would only appear in one form, "New Jersey—Newark," regardless of its usage.

Second level geographic names in FAST are entered as subdivisions under the name of the smallest first level geographic area in which they are fully contained. An example is the established heading for the Mason Dixon line, the boundary between several states famously known in the 1800s as the line of demarcation between the North and the South. In FAST, the established heading is "United States—Mason-Dixon Line," whereas LCSH simply establishes the heading without qualification as "Mason-Dixon Line," since it runs between several state boundaries. For the most part, FAST geographic names are limited to two levels. The exceptions most commonly found are place names within cities. An example in FAST is the heading "California—San Francisco—Chinatown" which is quite different from the established LCSH heading "Chinatown (San Francisco, Calif.)".

FAST retains the use of qualifiers (County, Lake, etc.) to specify the type of geographic area being referred to, and to distinguish between geographic entities that share the same name. In the United States, county names are most commonly used to qualify areas within the same state that share the same name. Following the practice of LCSH, populated areas are considered the default entity and do not require a qualifier.

**Form**

Form headings in FAST have been established by extracting all of the form subdivisions from existing LCSH topical and geographic headings. In a separate research project, existing form subdivisions that have been coded as $x instead of $v were identified algorithmically, and recoded as $v prior to their extraction. Examples of established FAST form headings include the following:

Abstracts
Case studies
Rules
Translations into English
Dictionaries—French
Statistics—Databases

**Period**

Following the recommendations of the ALCTS/SAC Subcommittee, and those recommendations made at the Airlie Conference, period headings in FAST reflect the actual time period of coverage for a specific resource. Therefore, FAST chronological headings are expressed as either a single numerical date or a numerical date range. For example, the LCSH heading "20th century" is expressed in FAST as "1900-1999." A prehistory period such as the Jurassic period is expressed as "190000000-140000000 B.C." in FAST. In the case of date ranges, the general restriction is that the second date expressed in the range must be larger than the first. Therefore, routinely creating authority records for period headings are not necessary. However, period headings that are used as main headings and treated topically are established in the FAST authority file as topical headings and not as period headings, such as "Twentieth century" when used as a main heading, for example "Twentieth century—Public opinion." LCSH headings that contain topical information in chronological subdivisions, such as "$y Civil War, 1861-1865" have been converted to topical headings in FAST, in this case "Civil War (United States, 1861-1865)," to ensure valuable contextual information is not lost from the heading which would be the case if only the FAST chronological heading "1861-1865" were used.

**Personal and Corporate Names**

Personal names and corporate names are established as FAST headings and are derived from the NACO Name Authority File. In order for a

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**OLAC 2006 Conference:** Preparing for a Brave New World: Media Cataloging on the Threshold of RDA

*Featuring keynote presentations on RDA by **Jennifer Bowen**, Head of Cataloging at the University of Rochester and **Dr. Barbara Tillett** from the Library of Congress.*

personal or corporate name to be included in the FAST authority file, the name has to be established in the Name Authority File and valid for use, and the name has to have been used in at least one WorldCat record as a subject. Established personal name headings include the fuller form, numeration, dates, and titles associated with those names. Personal name headings in FAST look much like established headings in the NACO Name Authority File. Corporate names are established using the main body and all of its subordinate units, and include jurisdictions as well as corporate bodies. Name-title entries have not been established at this time, but the research team has plans to further develop these kinds of headings in the future. Some examples of name headings in FAST include:

> Dewey, Melvil, 1851-1931
> Kennedy family
> OCLC
> American Society for Information Science and Technology
> American Library Association. Cataloging and Classification Section

## FAST Authority File

FAST headings have been derived and established from LCSH subject headings that have been either established or exist in WorldCat records. An example of the faceting process follows:

> LCSH heading: Art, Modern $y 20th century $z France $v Exhibitions

> FAST headings:
>   Topical: Art, Modern
>   Geographic: France
>   Chronological: 1900-1999
>   Form: Exhibitions

Each of these FAST headings has been established in an authority record that utilizes the MARC21 format for authority data, with some minor modifications to accommodate the structure of FAST headings. Currently, FAST authority records do provide the means to refer back to the original LCSH authority record (field 7XX), where one

exists. Compare the authority records for the LCSH (on the next page) and the FAST established heading "Graphic novels" shown below.

FAST authority records retain see and see from references (fields 4xx and 5xx), as well as notes on usage (field 688). Currently, the draft version of the FAST authority file is available through a searchable interface at http://fast.oclc.org. Headings are still undergoing a validation process, so changes may still be made to the records before a final version is made available.

## FAST, LCSH, and the Future

LCSH as an indexing vocabulary has been widely used and offers many advantages. The richness of its vocabulary enables coverage of all subject areas, it imposes synonym and homograph control, and it has been used by thousands of libraries in millions of bibliographic records. However, LCSH does not function as a true thesaurus that comprehensively lists every valid subject heading. Instead, LCSH combines authorities (currently five print volumes) with an extensive manual of rules for constructing headings that are not established in the authority file, and for further subdivision of established headings. Some of the complexities of heading

### FAST Authority Record
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000    nz n
001    fst00946656
003    OCoLC
005    20041024193302.0
008    041024zneanz||babn n ana d
040    OCoLC  $b eng  $c OCoLC  $f fast
150    Graphic novels
450    Comic book novels
450    Graphic fiction
550    Comic books, strips, etc.
550    Fiction
550    Popular literature
688    LC subject usage: 22 (2005)
688    WC subject usage: 5,903 (2005)
750 0  Graphic novels   $0  (DLC)sh 94008233
```
_____

## LC Authority Record - ARN 30745031

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Rec stat c      Entered 20050726      Replaced 20050906074027.0

| | | | | | | |
|---|---|---|---|---|---|---|
| Type | z | Upd status | a | Enc lvl | n | Source |
| Roman | | Ref status | a | Mod rec | | Name use b |
| Govt agn | | Auth status | a | Subj a | | Sub use a |
| Series | n | Auth/ref | a | Geo subd I | | Ser use b |
| Ser num | n | Name | | n    Subdiv tp n | | Rules n |

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| | |
|---|---|
| 010 | sh 94008233 |
| 040 | DLC ‡b eng ‡c DLC ‡d DLC ‡d \|AhCCS ‡d WaU |
| 150 | Graphic novels |
| 360 | ‡i subdivision ‡a Comic books, strips, etc. ‡i under names of individual persons; under individual sacred works, e.g. ‡a Bible--Comic books, strips, etc.; ‡i and under topical headings; and headings for genres of comic books, e.g. ‡a Fantasy comic books, strips, etc. |
| 450 | Comic book novels |
| 450 | Graphic albums |
| 450 | Graphic fiction |
| 450 | Graphic nonfiction |
| 450 | Graphic novellas |
| 450 | Nonfiction graphic novels |
| 550 | Comic books, strips, etc. ‡w g |
| 550 | Fiction ‡w g |
| 550 | Popular literature ‡w g |
| 670 | Work cat.: 94-23984: Rothschild, D.A. Graphic novels, 1995. |
| 670 | LC database, Nov. 3, 1994 ‡b (40+ entries for individual graphic novels under series title) |
| 670 | City of light, city of dark, c1993: ‡b t.p. (comic-book novel) |
| 670 | Rothschild, D.A. Graphic novels, 1995: ‡b p. xiii (a graphic novel is a sturdy, lengthy comic book that contains a single story or a set of interrelated stories told using "sequential art"; other terms: trade comics (which already has a meaning in the industry); commix, invented by Art Spiegelman to de scribe "a co-mixing of words and pictures" (too similar to comics and comix to catch on); graphic al bum (the European term--same problem as graphic novel, with audio overtones); illu-novel (too clunky to catch on); and gekiga (the Japanese term for the genre)) |
| 670 | Gorman, M. Getting graphic!, c2003: ‡b p. xii (graphic novel is used in the library profession to describe an original book-length story, either fiction or nonfiction, published in comic book style or a collection of stories that have been published previously as individual comic books; conventional graphic novel begins and ends a story within the first and last page of the book; the use of the seem ingly erroneous label of "novel" for all books created in a comic-style format must be understood and accepted as the status quo) p. 60 (graphic nonfiction) p. 66 (graphic work of nonfiction) |
| 670 | Wikipedia, July 26, 2005 ‡b (Graphic novel (sometimes abbreviated GN) is a term for a kind of book, usually telling an extended story with sequential art (i.e. comics); most broadly used to refer to any long-form comic book or manga, i.e. the comics analogue to a prose novel or novella; can apply to works which were previously published serially in periodical comic books, or to works produced specifically for book-format publication; some use the term "graphic novella" for works that fit the general sense of the term (a single, well-developed story), but are less than 100 pages; in the book trade the term is sometimes extended to include material that would not be considered a "novel" if produced in another medium. Collections of comic book issues that do not form a single continuous story, anthologies of short loosely-related pieces, and even non-fiction are stocked by libraries and bookstores as "graphic novels") |
| 670 | Lyga, A.A.W. Graphic novels in your media center, 2004: ‡b p. 15 (comic books can--and do-- encompass the entire range of fiction and nonfiction) p. 17 (all graphic novels are comic books, but not all comic books are graphic novels) |
| 675 | Ward. Longman companion to twentieth century literature, 1991; ‡a Random House; ‡a Web. 3 |

construction include the use of free-floating subdivisions controlled by pattern headings, the use of multiples (e.g., $x Naval operations, American, [British, etc.]), and the construction of music headings. Although correct and valid headings of these types can be constructed according to the manual, these headings may not have corresponding authority files. Despite the fact that the syntax and richness of LCSH provides subject access that exceeds the capabilities of keyword access, its complex syntax as illustrated by the previous examples make it an unwieldy schema to use in nontraditional cataloging environments.

Since FAST headings are derived from LCSH, they retain the rich subject vocabulary of LCSH. However, FAST headings are far more amenable to the online environment. The simplified syntax means a broader range of users with basic cataloging skill sets can assign subject terminology to a large number of online resources. Furthermore, FAST headings have been designed to provide functionality for LCSH in the online, post-coordinate environment, which was previously inhospitable to the long, pre-coordinated subject strings of LCSH. Finally, the faceted nature of FAST headings means a more complete authority file of headings can be created and maintained, and can foster more effective automated subject authority control than what is currently available with LCSH.

The development of FAST has already generated some impact in the cataloging world. MARBI has already approved changes to both the MARC21 authority format as well as the MARC21 bibliographic format to accommodate some of the unique features of FAST headings. One example is the use of field 648 with a second indicator of 7, subfield $2 fast in MARC bibliographic records to indicate chronological headings. FAST can also be easily mapped to Dublin Core metadata qualifiers,

| FAST Facet | Expressed as Dublin Core Qualifier |
|---|---|
| Topical | Subject |
| Chronological | Period |
| Form | Type |
| Geographic | Coverage.spatial |
| Personal Name | Creator/namePersonal or Contributor/namePersonal |
| Corporate Name | Creator/nameCorporate or Contributor/NamePersonal |

facilitating their use in the cataloging of internet resources such as websites. On this page is an example of Dublin Core mapping from FAST facets.

OCLC is also conducting research exploring the use of FAST as a knowledge base for automatic classification, again as a way of enhancing access to the vast number of electronic and online resources that libraries are trying to organize for user access.

As these research initiatives move closer to fruition, the next step for catalogers is to evaluate how these tools can be integrated successfully, if at all, into existing technical services operations. Unlike LCSH, subject cataloging manuals for FAST have not been written. Despite the research team's hope that FAST headings are simple enough that manuals will not be necessary for implementation, the realities of introducing any new cataloging tool certainly warrant some sort of formalized instruction in regard to its use.

Potential barriers to implementation certainly exist. The inclusion of erroneous headings in FAST that have been derived from validated but incorrect subject headings that have been assigned to WorldCat records pose a problem for maintaining the integrity of the FAST authority file. Although the research team has developed a series of algorithms designed to validate extracted FAST headings, thereby minimizing the presence of erroneous headings, there is still the possibility a number of invalid headings will make it into the authority file. The issue of validation is still present in OCLC's Connexion software, and the fact that it has not yet been resolved in software that has already gone through several upgrades does not bode well for the prospect of validation in FAST. An example of this type of problem would be the incorrect heading "Frontier and pioneer life—Cultural assimilation—China." The extracted FAST headings would be the topical heading

"Frontier and pioneer life—Cultural assimilation" and the geographic heading "China." The LCSH scope note for the free-floating subdivision "Cultural assimilation" clearly states it should only be used under headings for ethnic groups, but Connexion recognizes the entire heading as valid. The subject cataloging rules that are spelled out by the scope note in LCSH for this particular subdivision can only be applied by an individual who understands the difference between a topical heading for ethnic groups and topical headings for a historical way of life.

As technical services face the challenge of providing bibliographic access to ever-increasing numbers of resources in a growing number of formats, the balance between the ease of automation and the uniqueness of professional expertise becomes harder to maintain. Hopefully, projects such as FAST will continue to be developed that allow tried and true cataloging methods and tools to evolve into rich tools for resource enhancement in the dynamic library environment.

## After the Drive Home

Long after the event
in the weeks that follow,
memories surface
and with them, new
understanding or
fresh insight, smiles
and confidence gained
because of the experience;
and how many speakers know
their words continue on? or
that their gestures remain
as inspiration for numerous
individuals applying skills and
knowledge from conference
offerings.
Praise, though sometimes
silent, exists for those who
give of themselves

# By Jennifer Bull

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# Mohican II a Roaring Success

**by Roger M. Miller, Manager, Catalog Department**
**Public Library of Cincinnati and Hamilton County**

The Ohio Library Council Technical Services Division retreat was held April 25-26 at Mohican State Park Resort and Conference Center in Loudonville, Ohio. This event, billed as "Technical Services 2006: Charting a Course" was the Division's second retreat, following the superb 2003 retreat that featured Janet Swan Hill. This year's retreat followed the same basic format of a keynote address, a day and a half of breakout sessions, and a concluding plenary session at which the keynote speaker synthesized the retreat for the participants. Our keynote speaker for this year's retreat was Sheila S. Intner, Professor Emerita, Simmons Graduate School of Library and Information Science.

The retreat attracted 98 attendees from a variety of places and types of institutions. One of the goals that the retreat planners had was to offer speakers and programs that would attract an audience that was not limited to public libraries in the state of Ohio. This goal was fully realized, with over 40 attendees from university libraries or other type of institution outside of the public library world. Several came from as close by as Michigan, Indiana, Kentucky, and Pennsylvania, but the retreat also drew attendees from as far away as Virginia and Arkansas.

Professor Intner kicked off the retreat by offering the audience several ideas to consider. She argued that cataloging rules must be simplified (although it appears that RDA will not accomplish this) that the cataloger's judgment should be upheld, and that we need to figure out ways to reward initiative. As computers become more sophisticated, we should strive to automate as much of the descriptive cataloging process



**Mohican State Park**
Photo courtesy of Maxine Sherman

as possible in order to free cataloger time to do pragmatic work that adds value and local emphasis to the catalog.



**Sheila Intner, Keynote speaker**
Photo courtesy of Maxine Sherman

Four programs were presented following lunch. Carolyn Sturtevant, BIBCO Coordinator at the Library of Congress, provided an overview of various standards organizations such as PCC, SACO, and NACO. OCLC staff presented all the afternoon's other programs. Eric Childress and Chris Grabenstatter discussed the *Environmental Scan: Pattern Recognition (2003)* and applied it to technical services. Glenn Patton provided an update on RDA and FRBR, and George Needham offered insights into how isolated technical services librarians can become more engaged in the profession, both locally and at higher levels. The evening meal at the retreat featured an after-dinner speaker. The irascible Manuel Urrizola (University of California at Irvine) cajoled and entertained the audience with his version of Figaro's aria from the *Il Barbiere di Siviglia,* parodied as "Largo al Mexico!"

On the second day of the retreat, conference attendees first enjoyed a delicious breakfast and scenic views of the lake, and then ventured off for more programs. Louise Sevold (Cuyahoga County Public Library) instructed her audience on political skills they could develop to better promote their organizations. Beth M. Russell (Ohio State University) gave an enthusiastic and informative presentation about non-MARC metadata. Carol Bradsher (Experiential Learning) discussed pros and cons of controlled vocabulary versus keyword, which was particularly timely given that the Library of Congress had announced its policy change regarding series authority records just days before the retreat. Along the same vein, Athena Salaba (SLIS, Kent State University) discussed how Google and

Amazon are affecting user expectations and how this might offer us ideas for changing our catalogs. Elizabeth Brice (Miami University) offered her insights into the future of technical services and how we might consider navigating the next 20 years of rapid change.

After lunch, Professor Intner offered the insights she had gained from all the programs she attended. She remarked that the Mohican retreat was the finest professional development she had attended in 20 years, and what she would carry away would make her a better teacher, which was high praise indeed! In closing, she stated that our catalogs don't need to be retired; rather they need to be improved and enhanced.



**Roger Miller at the retreat**
Photo courtesy of Maxine Sherman

As this year's Division Coordinator, I would like once again to thank the Program Planning Committee for all the hard work that went into making our Mohican retreat such a great success. The planning committee was comprised of Constance Strait, Andrea Christman, Dan Liebtag, Jeni Bull, Bonnie Doepker, Kathy Hughes, Ian Fairclough, Margaret Maurer, Sevim McCutcheon, Maxine Sherman, and Marilyn Spence. The committee was ably supported throughout the planning process by Wayne Piper, OLC's Director of Professional Development.
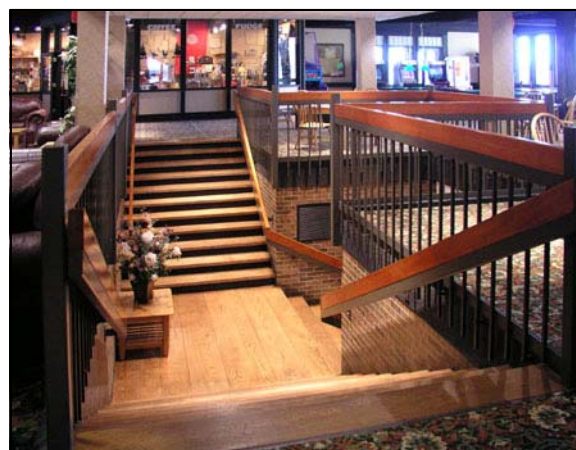
The Technical Services Division will begin planning for the 2008 Mohican Retreat next summer. If you have ideas for possible programs or speakers, please feel free to contact me at mailto:roger.miller@cincinnatilibrary.org.

# A Deaf Librarian's First Time at the OLC's TS Retreat

*by Julia Dunlap, Catalog Librarian*
*Arkansas State University, Jonesboro, Arkansas*

If I were asked to rate my experience at the Ohio Library Council's Technical Services Retreat at the Mohican Resort & Conference Center I would have to say it was a $Q^2B^2$ —Quality Presentations by Quality Presenters with Beautiful Attendees in a Beautiful Setting. My attendance invigorated me technically, professionally, and personally.

Being deaf often presents a challenge in communicating with those who do not use sign language or interact with the hearing impaired. An interpreter was provided which allowed me to understand exactly what was being presented at the sessions and to more directly interact. More importantly, I really did appreciate the way the other attendees made me feel welcome and right at home. I was concerned that I might be left alone or left out because I was the only deaf attendee and the only one from Arkansas. But this was never the case. I



was always included and encouraged to participate in every session and activity. This was a very wonderful experience for me.

**Mohican Lodge Interior**
Photo courtesy of Maxine Sherman

The sessions I attended increased my knowledge and understanding in many ways.

*Pattern Recognition for Tech Services: Interpreting the OCLC Environmental Scan* was the first session I attended on Tuesday, April 25, 2006. Eric Childress (Consulting Project Manager, OCLC Research) and Chris Grabenstatter (Global Product Manager for Online Cataloging at OCLC) were the presenters. We were encouraged to see what the big picture looks like and to appreciate the vast changes that are happening in the publishing industry, the information distribution industry, information science and libraries.

*Getting to the On Ramp* was presented by George Needham, Vice President, Member Services, OCLC. The presentation began with a relevant quote: "If you're in control, you aren't going fast enough!" Mr. Needham provided definitions and examples of listservs, blogs, XML, RSS feeds and aggregators. He suggested three ways to discover new sites: blog rolls, "best of" lists and blog cross references.



**Doug Evans, OLC Executive Director at the TS Retreat**
Photo courtesy of Maxine Sherman

Wednesday I attended *Non-MARC Metadata for Technical Services Librarians?*, presented by Beth Russell from The Ohio State University. She introduced using non-MARC metadata by explaining that there are five basic types: descriptive, administrative, structural, preservation and technical. She spoke on the history of metadata and gave examples of Dublin Core, Text Encoding Initiative (TEI) and Visual Resources Categories (VRA) as well as other schemes such as the Metadata Encoding and Transmission Standard (METS) and the Metadata Object Description Schema (MODS). Ms. Russell completed her presentation with challenging and thought-provoking questions about how the non-MARC trends could affect technical services. She also provided us with a bibliography of non-MARC Metadata publications and websites.

The final session, *Sounding the Call, the Future of Technical Services*, was presented by Elizabeth Brice, Interim Assistant Dean, Miami University. She spoke on the duties and responsibilities of technical services librarians in the future. She em-phasized the need for more education, training and skills for both current and new jobs that will be created in our libraries. Ms. Brice noted that with shrinking budgets and more automation, we must be creative and ready for change.

As much as I learned in the sessions, the best was yet to come. The keynote speaker, Sheila Intner (Professor Emerita, Simmons Graduate School of Library and Information Science) was informative and challenging. Her address encouraged me to find a new direction for the library and gave me insight into assessing the changes and improvements that I have made as a catalog librarian. Ms. Intner gave us an idea of the kind of thinking that will be imperative for technical services librarians in five or six years. She ended with a big challenge to librarians to stay in good shape in the technical services atmosphere.

This was my first trip to Ohio. I could not imagine that this was such a gorgeous state. As I traveled from Columbus to the Mohican State Park, I found the trees and farms just as scenic as those in Arkansas. As pretty as it was, there was no comparison to the breathtaking beauty of the Mohican State Park. My roommate and I were able to see the dam, the covered bridge, the fire tower and camping areas. I was surrounded by beautiful scenery and warm-hearted people.

I want to give special thanks to Wayne Piper, the Director for Professional Development at the Ohio Library Council, for being a wonderful host and providing me with an interpreter, Meredith Hampton. My attendance at the Technical Services retreat was fun as well as informative. It was a positive learning experience for me and I hope one for the other attendees as they interacted with me. I want to thank all of the librarians and interpreters who associated with me, a deaf librarian, at the retreat.

# Cataloging Playaways—Is it in Your Future?

*by Jeanne Poole, Assistant Manager, Technical Services/Catalog*
*Toledo-Lucas County Public Library*

Are your patrons tired of taking a CD player or a tape player with them wherever they go?  Tired of changing discs or cassettes in their cars? Tired of keeping track of just how many cassettes or CDs are in the set? Would they prefer to not own MP3 players or similar devices? If so, the Playaway may be just the ticket for them, and for your library.

A Playaway is a compact, self-contained, digital device, half the size of a deck of cards that can fit easily into a shirt pocket, a pants pocket, or a handbag. A AAA battery and a set of headphones are required for listening.  The "reader" controls the speed of the narrator's voice and can digitally bookmark up to 50 spots, control the volume, and repeat desired passages. Playaways are manufactured by Findaway World, a Cleveland, Ohio company.

Each Playaway contains one book that may range from six to twenty hours of playtime. These books run the gamut from fiction to nonfiction, adult and juvenile titles.

Interested? Wondering how to catalog them once they are part of your collection? Catalogers can take one of two approaches to cataloging these devices, they can create a complete record (in OCLC if they are an OCLC library, in their library catalog if not) or they can create briefer records and enter them directly into their online catalogs.

Libraries selecting the second option may do so for a couple reasons. They may be venturing into new waters and want to test the reactions of their patrons. Brief, in-house records will allow them to give patrons access to the new format without investing significant time and money cataloging a product that may not be a hit with patrons. The perception may also be that Playaways will not make a significant impact on patron habits. These briefer records enable cataloging staff to move cautiously into a new area, learning as they go. The downside of this option is that other libraries will not be able to benefit from the work your library has done and that no other catalogers will be able to build on what you have learned. Patrons may also have a more difficult time finding the titles in the catalog.

Whatever choice is selected, catalog these devices as sound recordings. Sound recordings is the desired format because the titles are recorded books, just as books on CD and books on cassette are. Though the device is a digital one it is not considered to be an electronic resource.

Like any other sound recording, a bibliographic record for a Playaway will require an 007, 008, ISBN, call number, author, title, publication information, physical description, systems requirement note, narrator, subjects, and added entries. Since the majority of these fields, their contents, and construction are found in many formats and are familiar to catalogers, attention will be paid only to those fields treated uniquely when cataloging Playaways.

- The 007 field, displayed on the next page, reflects the uniqueness of a Playaway.

## 025.431: The Dewey Blog
http://ddc.typepad.com

One of the best ways to learn about a new technology is to find an opportunity to use it to learn about something that's interesting. *025.431: The Dewey Blog* is one of those opportunities. By following this blog on the Dewey Decimal Classification (DDC) and knowledge organization catalogers can learn how to blog and how to use RSS feeds. They can also follow a lively and broad-ranging conversation that is edited by members of the DDC editorial team, headed up by Jonathan Furner, Assistant Editor of the DDC.  Check it out!

- The general material designation (GMD) used in the 245 field is *sound recording.*

  245 1 4  The 7 habits of highly effective people $h [sound recording] / $c Stephen R. Covey.

- In addition to the publisher, the publication field may include Findaway as the distributor:

  260 _ _  New York : $b HarperCollins Publishers ; $a Cleveland : $b Findaway World, $c 2005.

- The 300 field can describe the Playaway in one of two ways:

  300 _ _ 1 sound media player (xxx hr.) : $b digital ; $c 8 x 5 cm.

Or

  300 _ _ 1 digital audio device : $b digital ; $c 3 1/2 in.

- Some libraries include a $e in the 300 field to call attention to the earphones and battery:

  300 _ _  1 digital audio device : $b digital ; $c 3 1/2 in. + $e earphones and a AAA battery.

- The 538 field can be used to indicate that the book is issued on Playaway, a dedicated audio media player. Hopefully, this bit of information will answer questions patrons may have about the device, will notify them that the Playaway is complete in and of itself, and will alert them to the fact that the Playaway is a bit different than other library formats.

| | 007 Field for a Playaway | | |
|---|---|---|---|
| OCLC | MARC21 Position | Code | Notes |
| ‡a | 00 | s | Category of material: Sound Recording |
| ‡b | 01 | z | Specific material designation: Other. A sound recording for which none of the other codes is applicable. A Playaway is not a CD, a cassette, a cylinder, a film, a sound tape reel, a record or any other of the traditional recordings that we have grown used to. |
| | 02 | \| | Undefined |
| ‡d | 03 | u | Speed: Unknown. Or at any rate, not currently known to us. |
| ‡e | 04 | s, or q, or u | Configuration of playback channels: stereo or quadraphonic, or unknown. |
| ‡f | 05 | n | Groove width/groove pitch: Not applicable (the device, like CDs, does not have grooves). |
| ‡g | 06 | z | Dimensions: Other (because none of the other codes is applicable). |
| ‡h | 07 | n | Tape width: Not applicable (because the item is not a tape). |
| ‡i | 08 | n | Tape configuration: Not applicable (because the item is not a tape). |
| ‡j | 09 | m | Type of disc, cylinder or tape (because the item is mass produced). |
| ‡k | 10 | z | Kind of material: Other. |
| ‡l | 11 | n | Kind of cutting: Not applicable. |
| ‡m | 12 | u | Special playback characteristics: Unknown |
| ‡n | 13 | d | Capture and storage technique: Digital storage. |

- It may also be prudent to include a 500 note with "Playaway" in it. Providing that note will enable patrons and staff alike to do keyword searches to retrieve all titles in this format.

- In addition to subjects describing the contents of the book, catalogers may wish to include *Audiobooks* or *Digital audiotape recorders and recording* as additional subjects:

    655 _ 0 Digital audiotape recorders and recording.

    655 _ 0 Audiobooks.

- A 710 may be added for the company if the cataloguer believes staff and patrons will be searching for these devices under the company's name.

It is highly recommended that libraries encourage patrons to supply their own earphones because of potential health issues. Libraries may also require their circulation staff to replace the AAA battery each time the device is returned, thus ensuring that the device is always ready to go.

There are beginning to be records in WorldCat that describe Playaways. To locate these records use the search "pb: Findaway World". A brief listing of records includes the following OCLC numbers: #62775106, #62776368, #62784285, #64193033, #62793575, #62764390, #62769401, and #62768424. The records can also be found by searching for "Playaway". Are you interested in finding out more about Playaways and Findaway, including the company's titles? Then check them out at http://www.playawaydigital.com.

# Check it Out: INFOhio's Tag Tutors:
## http://www.infohio.org/UC/TagTutors

Ohio librarians are familiar with INFOhio, Ohio's cooperative school library and information network that provides access to school library resources via a statewide union catalog. Tag Tutors is a pilot project developed by INFOhio to experiment with ways of providing cataloging training to K-12 librarians without requiring them to leave their libraries or purchase special equipment. The Tag Tutors videos are delivered on demand via streaming video from the Web. There are currently seven tutors including a general introduction and six tag-specific videos on the 260, 300, 504, 521, and 658 fields.

Each tutorial includes an introduction on the importance of the tag, the source of the information, how to code the indicators, as well as how to enter punctuation and subfield tagging. The tutorials are designed to teach coding and tagging for the MARC21 fields but also include information and advice regarding ISBD punctuation and AACR2 content standards. The pace of learning is relaxed and the tutorials feature easy to understand examples and sound advice that is current and accurate. Books are the principle subject examples but there is some information about cataloging standards for AV items. Unfortunately the graphics are somewhat primitive and the screen-shots and local standards are specific to the INFOhio catalog. Also, important MARC21 fields such as the 100 and the 245 are not yet developed.

These tutorials could be useful for teaching a beginning cataloger or technician to interpret data in the MARC21 standard. Perhaps they would also prove useful as add-on reinforcement to one-on-one training. Of course, no one that does all of these tutorials will know enough to truly catalog. But they might find them to be an interesting and enjoyable way to learn. Check it out!

# Death Dates Added to Some Personal Name Headings

*by Amey L. Park, Database Maintenance Librarian*
*Kent State University Libraries and Media Services*

Until recently, many personal name access points lacked death dates for headings such as *Ball, Lucille, 1911- ; Burns, George, 1896- ; Gershwin, Ira, 1896- ;* and *Warhol, Andy, 1928- .* Personal name headings provide a unique access point for each individual; they aren't intended to provide biographical information. Still, reference librarians sometimes found it difficult to explain this to patrons who pointed out the obvious "mistake" in the database.

This problem might be lessened with a Cataloging Policy and Support Office (CPSO) policy change in late September 2005 that concerns the addition of death dates to personal names. LC's new practices for authority records are summarized at http://www.loc.gov/catdir/cpso/lcri22_17imp.html and below.

1. Optionally add death dates to established headings that contain only birth dates when performing current cataloging or during routine authority file maintenance.
2. If an existing authority record's heading has NO birth or death dates, don't add them, unless there's a conflict. Catalogers should continue to record birth and/or death dates discovered after the heading is established in 670 (source data found) authority record fields.
3. Birth and death dates may be added to new authority records, even if existing bibliographic records with the heading don't have the dates.
4. Do not add the former heading to a 400 field with $w nne when the only difference is the addition of a death date. CPSO will investigate changes to the MARC21 authority format for coding "former headings" in a new MARC tag.

Please note that if you read LC's pages describing these policies, you might discover the acronym "BFM," which stands for "bibliographic file maintenance."

On February 6, 2006, CPSO began a project to add death dates to a selected list of name headings. This project is expected to be completed by the end of summer 2006. The list of names is at http://www.loc.gov/catdir/cpso/names.pdf

OCLC is providing weekly lists of all revised personal name headings via their "Closed Dates in Authority Records" page at http://www.oclc.org/rss/feeds/authorityrecords/default.htm. OCLC is also providing lists of changed headings via an RSS (Really Simply Syndication) feed at http://www.oclc.org/rss/feeds/closedauthorityrecords.rdf.

## Mohican Presentations available on the Web
http://www.library.kent.edu/mohican2006

As described in this issue, *Technical Services 2006: Charting a Course* provided participants with unique and interesting experiences. The Ohio Library Council and the presenters at the 2006 OLC Technical Services Retreat at Mohican State Park have graciously allowed the TS Division to share materials from their presentations quite widely, and Kent State University has provided space on the Web for their work. This Web page contains all of the speakers' MS PowerPoint presentations and some of their handouts. We recommend saving the presentations and then viewing them locally as this allows access to the speakers' notes. Please note that some of the presentations had to be split up in order to meet KSU's upload requirements. Many participants left Mohican 2006 with a great deal to think about, much of which is reflected on this site. Check it out!

Information on how to subscribe to RSS feeds can be found in the right information bar of the OCLC RSS Feeds and Podcasts page at http://www.oclc.org/rss/default.htm.

What do these changes this mean for libraries?

*If your library subscribes to a vendor-assisted authority control "update" or "notification" service* then you should receive revised authority records from your vendor. Depending on your system, existing bibliographic records will either be automatically corrected to their new forms or you might receive a report of headings to correct. You might want to also monitor the lists of revised personal name headings provided by OCLC and perform author and subject searches for them in your database to correct any headings that were missed.

*If your library does authority work in-house* then you should perform author and subject searches for names described above in LC's special project (February-summer 2006), as well as monitor the weekly changes reported via the OCLC RSS feed or webpage. Replace old authority records with the revised ones and correct any affected bibliographic records.

*If your library performs no authority work* then your online catalog will eventually have multiple versions of bibliographic headings as some names will exist in the old form (e.g., Diana, Princess of Wales, 1961- ) and headings for newly-cataloged or revised items will exist in the new form (e.g., Diana, Princess of Wales, 1961-1997). You can revise them as you discover them; or, because these changes will be so massive, a more proactive approach would be to follow the steps described above for the "in-house authority work" libraries.

As someone who has been involved with authority control since 1987, it will be good to allow some of these headings to finally rest in peace.

# Changes to OLC Elections

When you see the ballot for this year's OLC election, you will notice that the division membership is no longer voting for Technical Services Division officers. Instead, we will be choosing from four candidates to fill two Action Council seats for 2007-2009. Once elected, the Action Council will elect the officers for the division. The Ohio Library Council's Board of Directors adopted this change last year and we are now phasing it in. Since we already have some officers that were elected under the former method, it will be a year or two before the change is fully implemented. The following is planned for the Technical Services Division:

*Dan Liebtag* will complete his term as Past Coordinator through December 2006.

*Roger Miller* will complete his term as Coordinator through December 2006 and will then succeed Dan as Past Coordinator.

*Constance Strait* is now our Assistant Coordinator and will become the Division Coordinator in January 2007.

*Ian Fairclough* has agreed to serve as our Assistant Coordinator beginning in January 2007.

*Andrea Christman* has agreed to serve as the division's Secretary through 2007.

*Fred Gaieck* has been appointed to complete the rest of Ian Fairclough's term.

Later this month, the Ohio Library Council will hold its 2006 elections. As an OLC member, you will have the opportunity to select members of your organization's leadership, including members of the OLC Board of Directors as well as action council members of your division(s) and chapter. This year, the OLC will conduct its elections using online ballots. On June 30, you will receive an e-mail with details about how to login to access your personalized ballot and instructions for voting.

# Vote for Your TS Division Action Council Candidates!

There are two positions open on the TS Division Action Council and four volunteers have agreed to run for office. To help you decide who to vote for we asked each of them to tell us what they think the TS Division could be doing, and here's what they suggested:

### Rochelle Baker, Technical Services Coordinator, Burton Public Library

I think that the Technical Services Division could do more in the other areas of TS. Cataloging is definitely important in regards to the way we provide services to both our staff and patrons. However, collection development and management, acquisitions and processing seem to be subjects that are often overlooked when planning educational events. Many of the public libraries in Ohio are single building systems; more could be done to help their librarians stay up-to-date in all areas of TS librarianship. For example, I would like to see a Web page listing new sources and products available for processing materials, and maybe another that provides information/reviews of smaller vendors.

### Jennifer Bull, Supervisor/Head Cataloger, Ashland Public Library

I think the Technical Services Division could continue to strive for quality educational experiences, leading the way into the future for TS staff, by creating cutting-edge conference and intermittent programs. We should promote readership of our quarterly review, *TechKNOW*, continue creating useful publications for distribution, and actively pursue opportunities for communicating the value of our work as it relates to others in the library profession and to our library users.

### Michael Farmer, Monographic Cataloging Head, Ohio University Libraries

I think the Technical Services Division could plan programs that build on the successes of the past century and look for ways to incorporate the current advances in information technology to better meet the needs of our patrons. We need to show that what we do is not trapped in the past and that we are striving to make our services relevant to the current and future generations of users.

### Christopher Hill, Head of Technical Services, Wilmington Public Library

I think that the Technical Services Division could be providing more workshops geared toward smaller libraries in which the TS staff may not only be serving in TS but also serving in reference, circulation or even in an administrative capacity—and sometimes all of the above!

## OLC Cataloging Posters available to Division Members

Division members probably remember the cataloging posters created by the TS Division to help them catalog books, videos, spoken word recordings, Web resources and serials. The posters were printed and all of them were mailed until we ran out. The Division has had many requests for additional copies that have had to go unfilled, until now. Recently the Action Council made the decision to reformat the posters, stripping off the graphics, but providing the essential information in a PDF so that they could be distributed via the Internet. Now these helpful resources are always available to division members for reference or to print out. Visit the new TS Division Web page at http://www.olc.org/TechnicalServices.asp and look for them under "Resources/Publications."