

# Minutes of the MOBIUS Cataloging Committee

Meeting August 28, 2024, 10-11 am via Zoom

Members Present

* Sarah Jones, Northwest Missouri State University; Committee Chair
* Jill Mahoney, William Woods University; Board Liaison
* Vivian Gould, MOBIUS Consortium Office; MCO Liaison
* Becky Givens, Covenant Theological Seminary
* DeAnn Isenhower, Missouri Southern State University
* Richard Leach-Steffens, Conception Abbey & Seminary
* Nicole Merzweiler, University of Missouri – Columbia
* Julianne Newbury, Rockhurst University
* Michala Peterman, Culver-Stockton College
* Richard Pitaniello, Truman State University
* Julie Portman, Saint Louis University
* Rachel Utrecht, William Woods University

Members Absent

* Phyllis Holzenberg, Drury University; Committee Vice-Chair
* Donna Bacon, Ex-Officio, MOBIUS

Meeting Minutes

1. Call to order and introductions

Meeting was called to order at 10:01 am. The members present introduced themselves.

1. Adoption of the agenda

The agenda adopted without changes (Michala moved; Richard L seconded; motion adopted unanimously)

1. Information items

Vivian described what constitutes an information item (chiefly announcements). No one had any for today.

1. Discussion of meeting frequency and schedule (Vivian)

The Committee decided that, for the time being, bi-monthly would be the best meeting frequency. The Committee will be scheduled to meet every 2nd and 4th Wednesday of the month from 10-11 am, subject to the availability of the Chair, Vice-Chair, and MCO Liaison. If the Chair and Vice-Chair or the MCO Liaison is unavailable for a given meeting, that meeting will be canceled.

1. Discussion of the Committee Charge (Vivian on behalf of Donna)

The Catalog Committee is charged with identifying and producing necessary policies, procedures, standards, guidelines, best practices, etc. related to cataloging in the MOBIUS FOLIO tenant. There is a good change that the Committee will be producing a set of Cataloging Standards and Guidelines for the consortium, hence the involvement of the standalone members on the committee. Policies must be recommended to, and approved by, the MOBIUS Board of Directors.

1. New business
   1. Maintenance of shared MARC records (Vivian)

Vivian reviewed the difference between MARC (bib) records in the local tenants vs the shared tenant. Many libraries have requested guidance on whether and how to edit MARC records in the shared tenant, since the records no longer strictly “belong” to any one library. The committee discussed various topics related to this central question.

The Committee identified the following recommendations:

* Libraries in FOLIO may edit shared MARC/Instance records;
* Actual (character-for-character) duplicate fields may be removed without oversight;
* Fields that are essentially dupliates (same data; different format) may be edited, using RDA standards;
* Libraries should not remove fields “just ebcause they don’t like them”;
* Local notes (590s etc.) should be stored in a Holdings and/or Item record, rather than a shared MARC/Instance record;
* Libraries that have holdings attached to the same MARC record should communicate with each other when considering edits to the record.
* Action Item: Vivian will determine whether anything in FOLIO/EDS/Locate/OpenRS points to the 260 field to the exclusion of the 264 field.

Vivian noted that one of the deliverables produced by the committee is likely to be a set of Catalolging Standards for the for the MOBIUS FOLIO tenant libraries and/or the MOBIUS Consortium as a whole

* Action Item: Vivian and Nicole will attempt to locate, access, and provide the MERLIN Cataloging Standards & Guidelines document. DeAnn will attempt to locate, access, and provide the SWAN Cataloging Standards & Guidelines document.
  1. Procedure needed for the deletion of MARC/Instance records in the shared bib file (Vivian)

Vivian had previous produced and made available a documented workflow on how to delete Items and Holdings records and set Instance records to be suppressed and marked for deletion (when no other library has holdings). However, it was subsequently pointed out that there is no known way for a library to ascertain whether other libraries have attached ORDER records.

Sarah said that Northwest has been moving their Items/Holdings into a “withdrawn” locations, rather than deleting them.

Richard P said that, at Truman, they have been hesitant to touch Instance records that have other libraries’ holdings.

1. Meeting adjourned at 11:01 am (Julie moved; Michala seconded; all approved)