



Missouri Evergreen Cataloging Policy

Adopted 12/10/2020

Revised 12/09/2021

Cataloging Policy Purpose

Missouri Evergreen libraries recognize that building a union catalog that is easy for our patrons to search requires that we use a common set of policies to create bibliographic records. These bibliographic records are the shared property of the consortium regardless of the number of holdings attached. It does not matter which library created the record, who transferred it into the database, or who has edited it since. Maintaining the quality and integrity of each bibliographic record is an interest and a responsibility we all share.

With recommendations from the Missouri Evergreen Cataloging Committee, the Missouri Evergreen Executive Board sets standards for these records. The Missouri Evergreen Cataloging Committee oversees quality assurance and training.

Missouri Evergreen Cataloging Committee

The Cataloging Committee chairperson will be appointed by the Executive Board, and its members will consist of catalogers recruited by the chairperson. Consideration will be taken to appoint committee members of varying library sizes. Cataloging committee members will be chosen from active catalogers with a demonstrated history of strong cataloging skills. Committee members will have the highest permission allowed in the Missouri Evergreen catalog, with the ability to edit other libraries' items.

The Evergreen catalogers will meet monthly. The meetings will be led by the Cataloging Committee and all catalogers are encouraged to participate. Regular participation strengthens our catalog and allows for open communication. Participation in meetings will help member libraries ensure compliance with this policy.

Updating the Missouri Evergreen Cataloging Policy

All changes to the Missouri Evergreen cataloging policy are coordinated through the Missouri Evergreen Cataloging Committee. The Cataloging Committee will recommend changes to the

Executive Board. Any Missouri Evergreen library can suggest changes to the Missouri Evergreen Cataloging Policy. Changes approved by the Cataloging Committee through a simple majority of those voting are then presented to the Missouri Evergreen Executive Board for final approval before being added to the policy document.

Levels of Catalogers and Cataloging Permissions

Missouri Evergreen libraries have identified two levels of catalogers. Each level has the same core list of duties and skills with additional responsibilities added at the higher level. Advanced is the highest cataloging level and includes all the skills and duties of Entry-level along with additional tasks which require special training and permissions. Any staff person who performs cataloging functions must receive Missouri Evergreen approved training. Each library is responsible for training their staff as appropriate to complete specific tasks in Missouri Evergreen. These tasks may include actions that have a low or local impact upon the Missouri Evergreen catalog. Each library assures that staff tasked with these duties receive adequate training and is supervised by the library's cataloging personnel. At the time of migration, or when a new cataloging staff member is hired, basic cataloging training must be completed prior to cataloging in the Missouri Evergreen system. A staffing survey will be conducted annually to confirm that each member library complies with this requirement. The survey will ask for the name and email address of each Advanced and Entry-level cataloger, as well as the name and email address of any other members of the library's staff who should be included in the Missouri Evergreen cataloging listserv. A biennial recertification provided by the Missouri Evergreen Cataloging Committee will be required for all Advanced catalogers.

Advanced Cataloger (more than one Advanced per library system allowed)

Each library must have at least one Advanced cataloger on staff. Advanced catalogers have access to permissions that allow edits on a broader scale. They are expected to have advanced understanding of MARC records, and may make edits, delete, and import bibliographic and authority records. As a member of the Missouri Evergreen community, Advanced catalogers oversee and train Entry-level catalogers and assure the quality of their work. They may also assist other member libraries with cataloging.

Entry-level Cataloger (more than one Entry-level per library system allowed)

Entry-level catalogers have access to permissions that allow limited access to items and call numbers. Entry-level catalogers are expected to have a basic understanding of the structure and function of MARC records. They are expected to be trained and overseen by an Advanced cataloger.

This table outlines the permissions at each cataloging level.

Cataloging/Bibliographic (Database) permissions	Advanced	Entry-level
Original cataloging	Y	N
Overlay pre-cataloging order records and incomplete/non-standard records with full MARC records	Y	N

Edit bibliographic records	Y	N
Merge bibliographic records	Y	N
Delete bibliographic records	Y	N
Create and modify authority records	Y	N
Import bibliographic records	Y	N
Add monograph parts	Y	Y
Add/edit holdings, call numbers, and item level data	Y	Y
Delete call numbers and items	Y	Y
Create acquisitions records for items	Y	Y
Create pre-cataloged items for ILL purposes	Y	Y
Replace barcodes	Y	Y

Participation Requirements

Missouri Evergreen member libraries are expected to:

1. Subscribe all catalogers and directors in each library system to the Missouri Evergreen cataloging listserv, as all notices coming from the Missouri Evergreen Cataloging Committee will be given via this listserv.
2. Complete training specified by the Missouri Evergreen Cataloging Committee.
3. Keep their holdings data current as indicated in the Best Practices document.
4. Endeavor not to add duplicate bibliographic records to the catalog.
5. Resolve problems as reported to them by the Missouri Evergreen Cataloging Committee, the Missouri Evergreen Executive Board, and by other Missouri Evergreen members.
6. Report to the Missouri Evergreen cataloging listserv or impacted library any records that they discover with issues that require item-level edits.
7. Attend a minimum of one (1) cataloging meeting every quarter.
8. All Advanced catalogers must be recertified biennially.

Suspending Cataloging Privileges

A catalog that is easy to search is very important to Missouri Evergreen, therefore, the Cataloging Committee will be diligent in reviewing record quality. If a library or individual cataloger consistently performs sub-standard cataloging, the library director will be notified and additional training will be required. If the problem persists, it will be referred to the library's Board of Trustees and then to Missouri Evergreen Executive Board and cataloging privileges may be revoked.

Corrective actions

Corrective actions will progress through the steps listed below:

1. Additional training will be mandated for the cataloging staff at the identified library.
2. Notify the Director of the library where a cataloging issue has been identified by the Cataloging Committee.
3. Identified library's Board of Trustees will be contacted regarding the situation.
4. Cataloging permissions will be restricted to Entry-level at the identified library.
5. Further non-compliance will be turned over to the Missouri Evergreen Executive Board for further action.

General Permanent Record Policies

Permanent Bibliographic Records

1. Must comply with Resource Description and Access (RDA) cataloging standards or other nationally approved cataloging standards as adopted by the Cataloging Committee and Missouri Evergreen.
2. Must comply with current MARC standards.
3. Must utilize Library of Congress subject headings and genre/form terms.
4. Must be signed in the 049 field.
5. Must not include local information within the bibliographic record.

Deduplication of MARC records

The deduplication process will take place whenever a new library migrates to Missouri Evergreen or once a year, whichever occurs first.

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