



Missouri Evergreen Cataloging Policy

Adopted 12/10/2020

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Cataloging Policy Purpose

Missouri Evergreen libraries recognize that building a shared catalog that is easy for our patrons to search requires that we use a common set of policies to create and maintain bibliographic records. These bibliographic records are the shared property of the consortium regardless of the number of attached holdings. It is irrelevant which library created the record, who imported the record into the database, or who has edited the record after. Maintaining the quality and integrity of each bibliographic record is of common 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 and the consortium cataloger oversee quality assurance and training.

Missouri Evergreen Cataloging Committee

The Cataloging Committee chairperson will be appointed by the Executive Board. The remaining seats will consist of active catalogers recommended by committee members and members of the board. Consideration will be taken to appoint committee members from varying library sizes and of varying levels of cataloging expertise who demonstrate a history of strong cataloging skills and a commitment to maintaining the integrity of the shared catalog. Committee members will have the highest permissions allowed in the Missouri Evergreen catalog, including the ability to edit other libraries' items.

The Missouri Evergreen catalogers will meet monthly. These 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.

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Missouri Evergreen Consortium Cataloger

The Consortium Cataloger is hired by the Executive Board with input from the Cataloging Committee and Chairperson. The Consortium Cataloger works closely with the committee to ensure that the Missouri Evergreen cataloging policies are followed by member libraries. Along with participating in the monthly cataloging meetings the consortium cataloger maintains the cataloging certification documentation and offers training sessions for catalogers throughout the consortium.

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 may suggest changes to the Missouri Evergreen Cataloging Policy. Changes will be approved by the Cataloging Committee through a simple majority vote, and 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 and system permissions 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 *unsupervised* 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 Basic 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 Level Cataloger

Each library must have *at least* one Advanced level cataloger on staff. Advanced level catalogers have access to permissions that allow edits on a broader consortium 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 level catalogers oversee and assure the quality of Basic level catalogers work. They may also assist other member libraries with cataloging.

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Basic Level Cataloger

Each library is required to have all active catalogers certified at the basic level. Basic level catalogers have access to permissions that allow limited access to items and call numbers. Basic level catalogers are expected to have a fundamental understanding of the structure and function of MARC records. They are expected to be trained and overseen by an Advanced level cataloger.

This table outlines the permissions at each cataloging level.

Cataloging/Bibliographic (Database) permissions	Advanced	Basic
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 their library system to the Missouri Evergreen cataloging listserv, as 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 holdings data current as indicated in the [Best Practices](#) document.
4. Avoid and eliminate duplication of bibliographic records in the shared catalog.

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5. Resolve problems as reported to them via email or listserv, by the Cataloging Committee, the 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. Recertify all Advanced level catalogers biennially.

Suspending Cataloging Privileges

A catalog that is easy to search is important to the Missouri Evergreen community, therefore, the Cataloging Committee will be diligent in reviewing record quality. If a library or individual cataloger consistently performs sub-standard cataloging, the following escalating corrective actions will be taken:

1. Additional training, provided by the Consortium Cataloger, mandated for the library's cataloging staff.
2. Notification of the library's Director by the Consortium Cataloger.
3. Restriction of staff to Basic level cataloging permissions.
4. Notification of the library's Board of Trustees by the Executive Director.
5. Referral of the library 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 agreed upon by the Cataloging Committee and adopted by Missouri Evergreen.
2. Must comply with current MARC standards.
3. Must utilize Library of Congress subject headings and genre/form terms.
4. 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. However, all member libraries are encouraged to "see a merge, do a merge" in order to help maintain catalog quality.