Access level record for serials

Background: Libraries are faced with an increasing need to gain efficiency in the cataloging process as well as reduce costs. Further there is a need to be more responsive to user needs by including in the record those elements that support resource discovery. Many libraries are considering a broader application of the access level record (recently successfully piloted and subsequently implemented for electronic integrating resources at LC) to other formats.

At the recent CONSER/BIBCO Joint Operations meeting, there was significant interest in a wider application of the access level record, including development of an access-level record for serials. At the subsequent CONSER operations meeting, there was further discussion of the levels of cataloging and the idea for **one** standard for serials cataloging was suggested - with institutions then using that as written or adding elements to a record as needed or appropriate. There was considerable interest in this approach.

In light of this interest, the PCC and LC will collaborate to develop and test an access level record for serials. The effort will take advantage of, and build, on the work already done by Tom Delsey and Dave Reser on developing and implementing an access level record for remote access electronic resources. The overall work will include an assessment of user tasks, development of an essential data set and cataloging guidelines, design of a pilot project and creation of a test set of records applying the data set and guidelines, and evaluation of the results of the pilot. If successful, a recommendation will be made to PCC to establish the access level record as the new standard for serials.

Goal: To define an access level record for serials; pilot that record with a group of LC/SRD and PCC catalogers; evaluate the results within PCC/CONSER.

Methodology: Use the access level record model designed by Tom Delsey for LC. Define the user tasks by confirming that the already-identified tasks apply to serials; determine any missing user tasks that pertain to serials, and identify any non-end user tasks pertinent to serials that must be supported. Define the essential data set, i.e., AACR2 and MARC21 elements that support these user tasks and are necessary in the record. Conduct a pilot to test the data set and guidelines.

Deliverables: A report of work accomplished including a chart of the mandatory data elements, an outline of the cataloging guidelines, examples of records prepared according to the data set and guidelines and an evaluation of the results of the pilot.

Timeline: No later than ALA Midwinter 2006: Chart of the essential data elements; outline of the cataloging guidelines
No later than April 27, 2006 (CONSER/BIBCO Operations meeting): Report of work accomplished including the evaluation of the pilot; examples of records prepared according to the data set and guidelines.

Participants and work plan: Regina Reynolds, LC, and Diane Boehr, NLM will co-chair the project. Ed Jones of National University will adapt the Delsey set of user tasks to accommodate

serials. A small working group of up to ten members representing LC and PCC will meet to propose the element set based on the user tasks for serials, and to develop the cataloging guidelines. A review group will provide comments and feedback to the working group. A group of pilot study volunteers from LC and other PCC member libraries will catalog a selected group of serials, first according to current practice and then according to the essential data set and guidelines. A group of reference staff from PCC and other libraries will evaluate both sets of records.