

Good Afternoon. Welcome to GOLD Abides: New adventures in resource sharing in Georgia. My name is Elaine Hardy, I am the PINES and Collaborative Projects Manager at GPLS. With me today are members of the GOLD Advisory Committee: Susan Morris, Head of ILL at UGA, Margaret Ellingson, Head of ILL at Emory's Woodruff Library. Cathy Jeffries, Associate Dean of Libraries at Clayton State, Sara Lagree Technical Services Librarian, DeKalb County Public Library. Donna Brumby, Assistant Director of Collections and Grants at Athens Regional is in the audience. Miriam Nauenburg, with University of West Georgia was unable to join us today.

## GOLD really ties Georgia libraries together



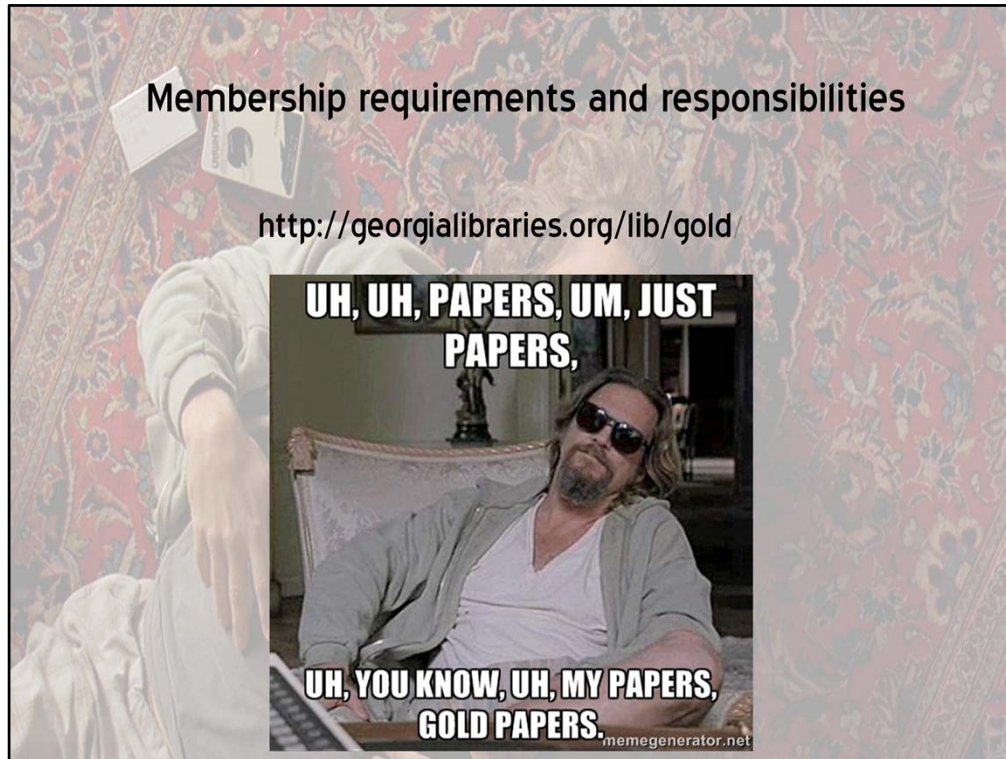
Today, we want to assure you that GOLD abides and continues to bring the state together with ILL and resource sharing. We are also here to introduce changes in GOLD and resource sharing in Georgia in the forms of the new membership agreement and changes in compliance, serials and holdings management, and in ILL and resource sharing management. We are going to cover a lot of ground quickly so that we leave time for questions at the end.

GOLD is a resource sharing consortium made up of all library types in Georgia. Its membership is diverse and includes public, academic, technical college, K-12, medical, legal and other special libraries. It is also a group access capability (GAC) through OCLC. A GAC is now seen by OCLC as an ad hoc resource sharing group united by some commonality such as subject matter or geography.

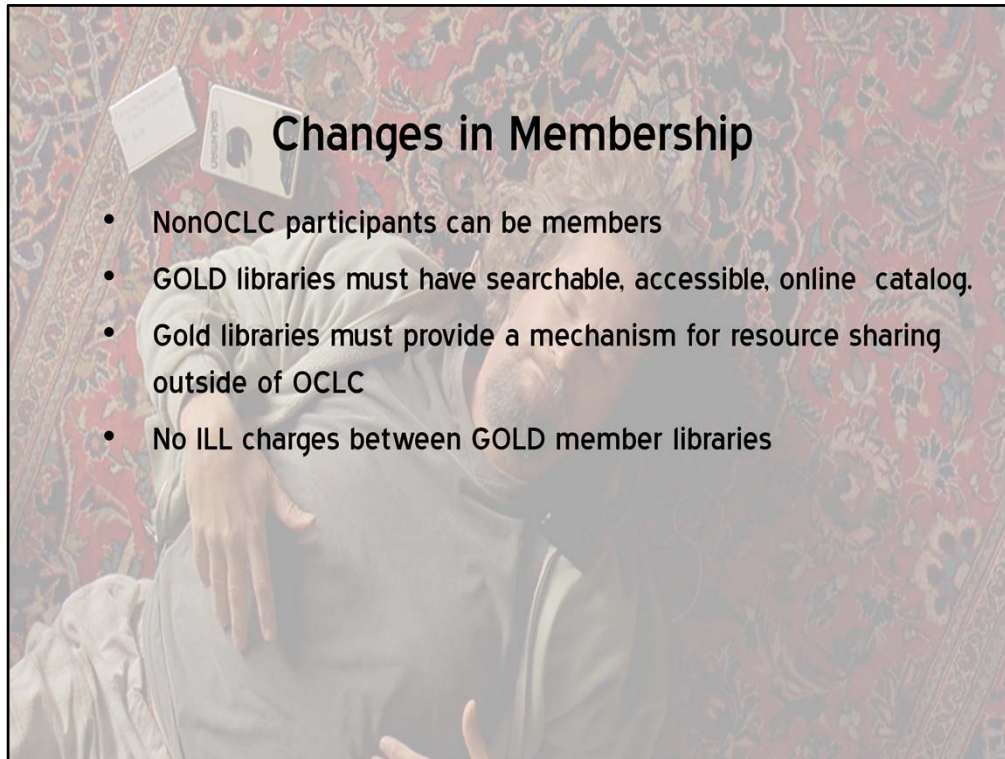


As I am sure you are all aware, there have been substantial changes at OCLC in the last 10 years that have affected resource sharing and serials and holdings maintenance. While the membership has kept abreast of these changes, GOLD has lagged behind in terms of the membership agreement and documentation. The GOLD advisory committee and I have been updating the GOLD documentation to reflect those changes and to broaden the scope of GOLD. Union databases, including serials union databases, within WorldCat are no longer supported. Affiliations with regional service providers such as SOLINET were severed. OCLC Membership criteria changed and categories such as affiliate or selective users were no longer used. And of course, the migration from local data records to local holding records and the changes in ILL platform to WorldShare ILL all occurred over the last several years. These and other changes in OCLC products and services necessitated that GOLD make changes to membership criteria and compliance.





The new membership agreement and the draft GOLD manual can be found on the GPLS website at <http://georgialibraries.org/lib/gold/>. The manual combines the old GOLD Interlibrary loan manual and the GOLD Serials Union Listing Manual. It is no longer a “how to”. It will be your resource for GOLD membership requirements and responsibility, compliance procedures and guidelines, and best practices in ILL, resource sharing and serials and holdings maintenance. Some sections of the manual are still under development. We hope to get it completed in the coming months.



The membership agreement and the GOLD manual now make provisions for nonOCLC participants to be GOLD members. With changes in OCLC, we have seen that many of our small or special libraries are no longer OCLC members, leaving them out of resource sharing. We would like to bring these libraries back into GOLD.

GOLD members will be required to have an accessible, searchable, online catalog to facilitate participation by nonOCLC libraries and must provide a mechanism for resource sharing outside of OCLC.

Also, charges for photocopies that had been allowed under the old agreement have been removed so that all ILL and resource sharing between GOLD libraries is at no charge.

## Compliance policies and procedures



Compliance structure and reporting will return.

We will be reinstituting compliance forms; we hope to move them primarily online. With the new compliance structure, a library can be a member in good standing, on probationary status, or have their membership revoked.



## Compliance policies and procedures

- Member in good standing: good faith effort to lend, follows ILL standards, has online catalog
- Member on probations: requests probation to clear up area of non-compliance; granted by Advisory Committee.
- Membership revoked: no complete compliance form and otherwise not in compliance.

A member in good standing will keep an accessible online catalog with current holdings, keep their holdings in OCLC up-to-date if a participant, make good faith efforts to lend and follow ILL standards for borrowing and lending.

A member on probationary status will be a library that has submitted a complete compliance form and indicated areas of non-compliance, with an explanation. The GOLD Advisory committee will work with the library to develop a plan to return the library to compliance and good standing.

A library can have their GOLD membership revoked if it does not submit a complete compliance form, probationary status is not granted, or they are otherwise found not to be in compliance. A revoked membership means a library is no longer eligible for GOLD benefits, including access to free borrowing.

A GOLD library will be able to file a complaint of noncompliance with GPLS and the Advisory Committee against another member library. Both will investigate and work with each institution to resolve identified issues.

Procedures to move off of probationary status and to reinstate revoked membership are under development. We also need to develop procedures for becoming a member of GOLD.



## Implementation: a work in progress



We have not updated the implementation plan yet, since we have not completed the manual and compliance forms. More information will be forthcoming. One thing we will need is an online, searchable membership directory. I am working with the GPLS webmaster to identify how we can best create such a directory. Implementation also will mean that all GOLD members will need to sign the new membership agreement since it represents substantial changes to the current membership requirements and responsibilities.



# GOLD Committees



GOLD Advisory Committee  
GOLD Cataloging and Serials Committee

The two GOLD committees will be revived. The current Advisory Committee is voluntary and abridged. The Serials Committee will be renamed the Serials and Cataloging Committee and will be organized around implementation.

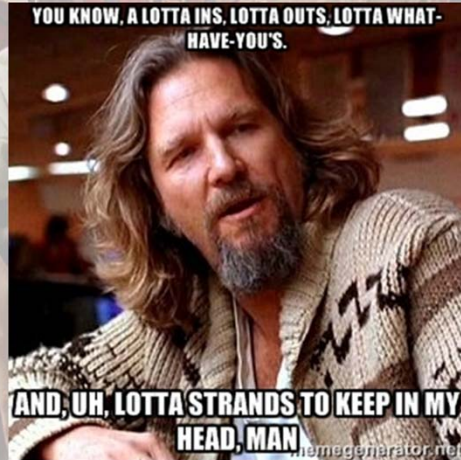
## Our New Logo



The last thing I have for you before I turn things over to the rest of the panel is our new logo. It is very similar to our old one. Since GOLD is no longer an online database, we have dropped that from the name. GOLD is no longer an acronym for Georgia Online Database. For continuity, we didn't want to change the name. GOLD will now be the resource sharing network for Georgia's libraries.

And with that, I turn things over to Cathy and Sara...

## Cataloging and Holdings Maintenance





The background of the slide features a person with long hair, wearing a light-colored jacket, sitting on a red and blue patterned rug. Several books are scattered around them, including one with the title 'Cataloging' visible.

## Cataloging Materials and Holdings Maintenance

### Important points to remember to ensure GOLD compliance

- ☐ An appropriately trained cataloging staff is essential.
- ☐ Maintaining a local catalog that is accessible on-line is required.
- ☐ Bibliographic records should be at the minimum level or better.
- ☐ Gold encourages cataloging that adheres to national and international standards.
- ☐ GOLD requires OCLC member institutions to update their holdings at least annually.



## Serials

### Single Record Approach vs. Multiple Record Approach

The national standard for cataloging specifies that a separate record should be used for each version (electronic, microfilm, microfiche, CD-ROM, paper, etc.) of a title. For new cataloging, the preferred GOLD practice is to utilize a matching record for that format and the LHR should be only that format's holdings. Libraries are encouraged but not required to retrospectively adopt this standard, replacing the single record approach.



## Serials

### Selecting the Best Record Checklist

Follow Standard Best Cataloging Practices in selecting a Record

- ☐ The leader, 006, 007, and 008 should be coded appropriately for your item
- ☐ The title, publication, and current frequency should match
- ☐ The physical format should be correct
- ☐ The record should have the appropriate 780 & 785 fields.
- ☐ If you have multiple apparently duplicate records pick the one that :
  - Has an 040 cataloging source of a CONSER Library
  - Has an 042 authenticated by lc, nlc, nsdp, or isds
  - Has the greatest number of holdings
  - Is the most complete





## Maintaining Bibliographic Records

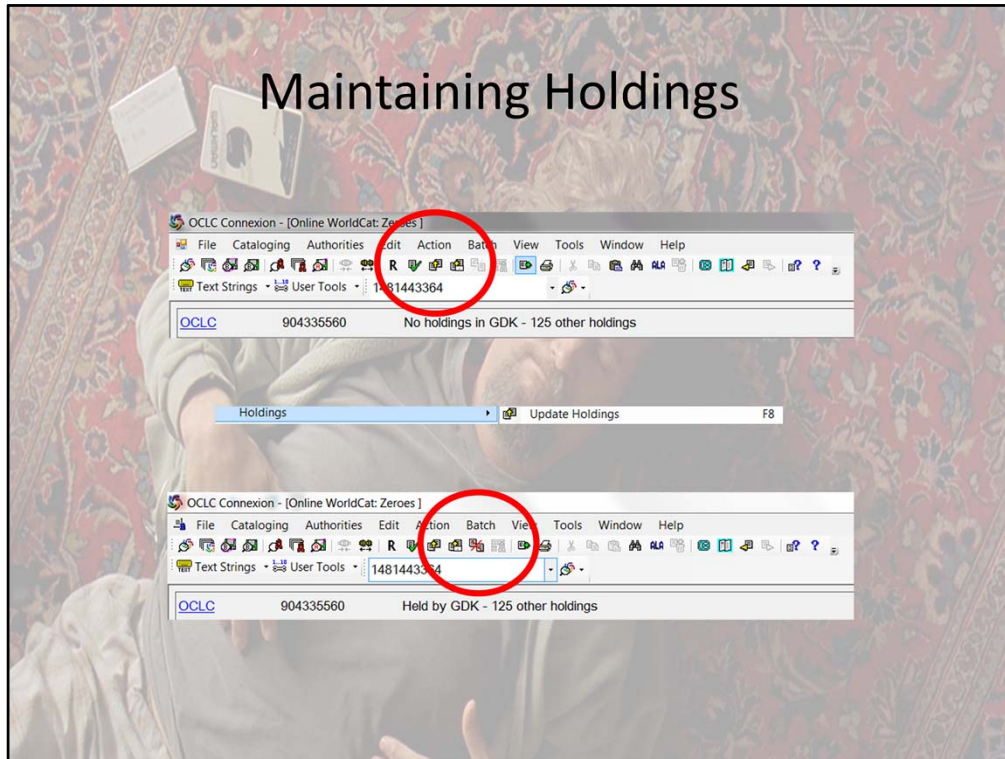
GOLD prefers OPAC entries to display at least the following minimal elements:

- Author (personal, corporate, meeting) (1XX fields)
- Title (245 |a)
- Publisher (260 |b)
- Publication date (260 |c)
- Format of item (Leader/06=Type, elements of various 3XX fields, 245 |h for AACR2 and earlier records)
- Physical description (3XX fields)

In addition to having an OPAC, GOLD recommends the catalog display the following essential information for each record.

This and other detailed requirements will be clearly stated in the GOLD Manual.

## Maintaining Holdings



To remain in compliance with GOLD membership requirements, holdings must be updated a least annually to keep holdings current.

Depending on institutional workflows, you may be keeping up with a large portion of this requirement on a daily basis.

Here's an example of an OCLC member institution updating holdings in Connexion while exporting a record for a new addition to their catalog.

**Zeroes**  
 by [Scott Westerfeld](#), [Margo Lanagan](#), [Deborah Biancotti](#)  
 Print book 2015  
 Database: WorldCat  
 Held by: [DeKalb County Public Library](#)

**Zeroes** / by Scott Westerfeld, Margo Lanagan, Deborah Biancotti.  
 by Westerfeld, Scott.

New York : Simon Pulse, c2015.

Description: 546 pages : 22 cm.  
 Edition: Simon Pulse hardcover edition.  
 Added Authors: Lanagan, Margo, 1962- author; Biancotti, Deborah, 1971-.

Summary: Told from separate viewpoints, teens Scam, Crash, Flicker, Anonymous, Bellwether, and Kelsie, all born in the year 2000 and living in Cambria, California, have superhuman abilities that give them interesting, but not heroic, lives u  
 a community to respond to a high-stakes crisis.

ISBN: 9781481443364 (hardback)  
 14814443364 (hardback)  
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 14814443372 (pbk)

Count: Number of Copies: 12 Number of Requests: 1

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Where to Find It			
Location	Collection	Call No.	Status
Brookhaven Library	Young Adult	S WESTERFELD	On order
Scott Candler Library	Young Adult	S WESTERFELD	On order
Chamblee Library	Young Adult	S WESTERFELD	On order
Clarkston Library	Young Adult	S WESTERFELD	On order
Decatur Library	Young Adult	S WESTERFELD	On order
Hairston Crossing Library	Young Adult	S WESTERFELD	On order
Northlake-Barbara Loar Library	Young Adult	S WESTERFELD	On order
Redan-Trotti Library	Young Adult	S WESTERFELD	On order
Salem-Panola Library	Young Adult	S WESTERFELD	On order
Stonecrest Library	Young Adult	S WESTERFELD	On order
Tucker-Reid H. Cofer Library	Young Adult	S WESTERFELD	On order
Wesley Chapel-William C. Brown Library	Young Adult	S WESTERFELD	On order

The new addition is now displayed in WorldCat as indicated at the top-right, while a check in the institution's OPAC also indicates ownership and local holdings. Local Holding Records help ILL staff target libraries that will be more likely to fulfill a request. An LHR will display: location (including call numbers and/or sub-locations); items held (like number of copies); publication patterns; and notes (retention policies, item condition, other distinctive characteristics).





Also as taken from the GOLD Manual, here are instances that will prompt you to update your LHRs for serials and remain compliant. The Manual will also state required fields and elements for LHRs, the punctuation to use for holding statements, authorized notes, and enumeration caption abbreviations. As mentioned just moments earlier, it is recommended that a separate record exist for each individual format of a serial owned, and should become the adopted practice for newly added serials or recently updated serial holdings. However, having more than one format on a single record remains acceptable.



There are four parts to MARC holdings records:

Location: the holding institution and the location where the title resides in that institution. This can include call numbers, shelving locations, and sub-locations such as branches.

Items held: For a single-part title, this can be the number of copies; for multiple part and serial titles, this can include number of copies and the volumes and issues retained by the institution.

Publication pattern: For serials, the record can be coded for the publication dates and issue numbering.

Notes: Information about holdings expressed in textual form. This can be broad retention policies, item condition, or distinctive characteristics.

**Life.**  
 [Chicago] : Time Inc., c1978-2000.  
 ISSN: 0024-3019  
 Description: 25 v. : ill. : 33 cm.  
 Notes: Popularly known as **Life** magazine.  
 Published: New York, NY. <Mar. 1992->  
 Continues: **Life**. ISSN 0024-3019, published 1936-72.  
 Augmented during the Persian Gulf War, 1991 by: **Life** in time of war.  
 Count: Number of Copies: 1 Number of Requests: 0

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**Subscription Summary**

**Decatur Library**

Location: Decatur Library  
 Collection: Periodicals  
 Status: Unknown  
 Media: mag  
 Type: mag  
 Main run: PAPER: July 1942-1972, 1988-May 2000  
 MICROFILM: Nov. 1936-1972, 1992-May 2000

Here is an example of a single record for Life magazine with both paper and microfilm format holdings noted. As is, it's not only common to come across these records in OPACs, but perfectly acceptable for GOLD compliance. Yet, if the library were to make any changes to their holdings, that would be the time to go ahead and separate the formats to create the additional record for microfilm holdings. This all leads to efficient resource sharing. Keeping your local catalog current and maintaining holdings in all formats in OCLC assists ILL staff in accurate and timely fulfillment of a patron's request.



Interlibrary Loan Remarks for "GOLD Abides" COMO 2015, October 8, 3:30 PM

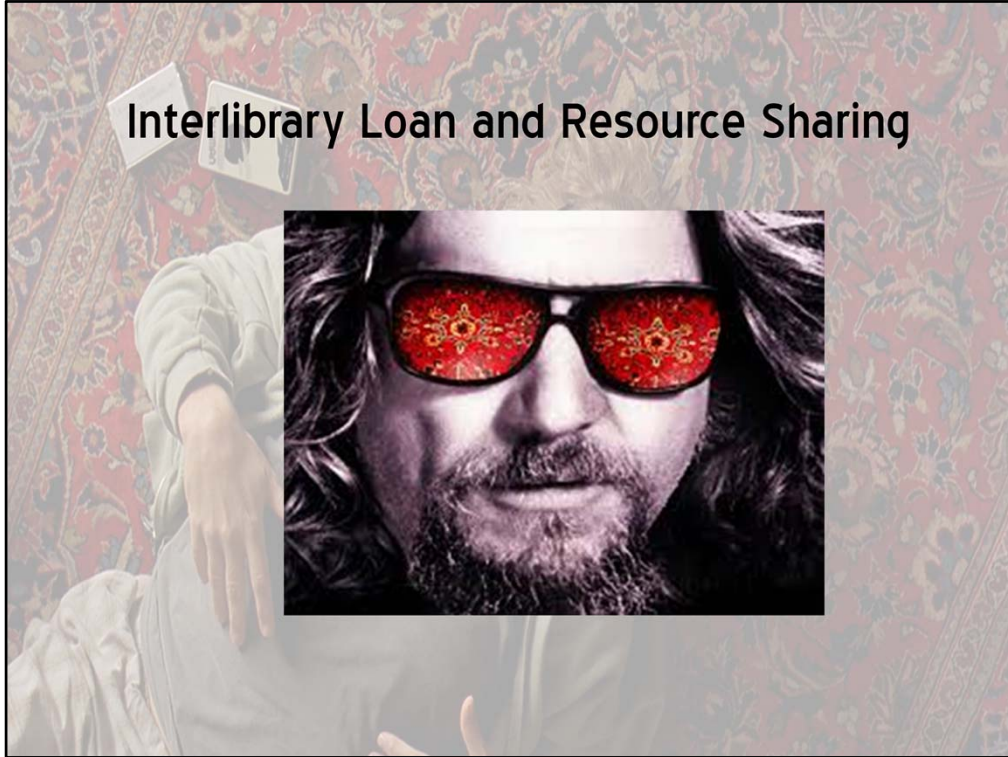
Susan Morris/Interlibrary Loan Librarian/University of Georgia Libraries/Athens

In this session today we are saying "GOLD Abides." If you've ever seen the 1998 cult film "The Big Lebowski," the premise of that film was that there were two Lebowskis. The action of the film was triggered because of a case of mistaken identity between the Lebowskis. Jeff Bridges was our main Lebowski, and despite a most convoluted, dark-humored, and sometimes harrowing plot, he—the Dude--as he referred to himself, abides in the end.

GOLD is a little like the Lebowskis. GOLD has been through some convolutions. We can think of two GOLDS--the original (old) GOLD that went into action in 1988 and the new GOLD that we are talking about today, which will, in a way, reset the starting line. The old GOLD went through some harrowing times, partly because of the economy, and one of the most visible results was that the ability to reimburse net lenders did not "abide." Nobody gets paid any more for being a net lender. We are introducing the new GOLD, but both GOLDS do have a common goal: *Resource sharing in Georgia is made more equitable by all libraries letting all other libraries know what they own and by being willing to share at no charge what they have.*



## Interlibrary Loan and Resource Sharing



In the beginning of old GOLD this was accomplished by everybody having their serials catalogers make sure holdings were accurate, and updated regularly in OCLC, so that ILL staff would not waste time by having to guess whether a particular library might have a needed issue of a journal, and if this goal was accomplished, the needed item was supplied without any charges.

While this will still be true of the way the new GOLD works, about 30 years have passed since the old GOLD was implemented. The landscape of resource sharing has evolved, so if you still have your old GOLD manual lying around somewhere, you'll see that many things in it have either changed or are now obsolete. In fact there used to be separate manuals for ILL and Serials Catalogers, whereas now we are proposing a single manual.



I will now briefly talk about some things to consider when doing interlibrary loan in the new GOLD environment:

1. **ONLINE ENVIRONMENT:** Publicize what you have (either by setting your holdings in OCLC or, if not an OCLC member, at least having your OPAC available on the web) is one factor. Another huge change since 1988: making your request of another library is now done exclusively online by all the major suppliers (Use WorldShare or ILLiad, but no longer paper requests, nor even faxing. Some systems like ILLiad provide for a non-OCLC library to register with the lending library and input a web form which will go into the supplying library's ILLiad workflow).
2. **THE TIERED APPROACH TO CONSTRUCTING YOUR LENDER STRING:** The tiered approach to borrowing in the old GOLD manual need not be strictly adhered to any more. It was designed to encourage everybody to spread the requests out—we do this more naturally today.
3. **DELIVERY METHODS** have changed: articles almost exclusively use electronic delivery; returnables within the state very often use a courier of some sort.

## Interlibrary Loan and Resource Sharing



4. **CHANGES IN THE ILL CODES:** The ILL Codes have been through revisions; everybody needs to be reacquainted (or in some cases acquainted) with them on at least the national and state levels. It's too bad that Margaret can't be here today, because she is on the committee for the upcoming national code revision and could go into more detail about this.
5. **NO REIMBURSEMENT:** The reimbursement incentive is gone; we no longer get "paid" via GPLS for being a net supplier. If we don't get any money for supplying, the question then might be "Why bother to be a GOLD member?" *Because GOLD members don't charge each other.* Therefore if you are not a GOLD member, any GOLD library in Georgia will be able to charge you the same fees that they charge, say, Harvard or the Los Angeles Public Library.
6. **YOU'LL NEED TO REREGISTER WITH GOLD:** So, why can't you just say that you are GOLD from "way back when" and let it go at that? You will need to reregister as a GOLD member. For one thing, while you might be listed as a GOLD member now in the OCLC ILL Policies Directory, at some point the old GOLD designation is going to be revised in the "Group Affiliations" section with only the "new GOLD registrants" given to OCLC by GPLS remaining.

So, in conclusion, as far as ILL is concerned GOLD is changing, and yet GOLD abides!



**GOLD ABIDES**

**TAKE IT EASY,  
MAN**

Questions?

**Documents:**

<http://georgialibraries.org/lib/gold/>

**Contact us:**

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