From the Editor

With the development of the AALL, OBS-SIS, and TS-SIS websites, TSLL’s stage presence isn’t as strong as it once was, especially for time-sensitive information. Nevertheless, published jointly by OBS-SIS and TS-SIS, TSLL is the still the best show in town for your professional development.

One of my “visions” for TSLL was to craft it into an information hub, where it would be the initial intake/triage platform for all incoming technical services law librarianship information (“all things technical services law libraries”). It would have a staff who would quickly determine what delivery system would be best for the newly incoming information. Announcements and news of all kinds would be directed to RSS feeds and be sent directly and instantly to subscribers, like a daily newspaper. Topical articles, regular columns of technical in-depth content, professional awards, election of OBS and TS officers, committee reports and task forces, with their final recommendations and actions, would be placed in a public staging webpage where they could be viewed as soon as they came in, and later would be copied or moved, and compiled and organized into a traditional-looking quarterly “issue” in PDF, or other format which expresses a permanent snapshot of content at that time for historical and reference purposes. TSLL would also be the place where collegial dialog and problem solving would take place via blogosphere, or wiki-style or social networking vehicle that would permit public, yet controlled and monitored dialog.

This is my final issue of TSLL as editor-in-chief. It’s been four years and it’s time for a new leader to work with the TSLL Editorial Board and the columnists to ensure our best show in town stays open on Broadway. I believe my tenure has improved TSLL, transforming it from a newsletter into a fairly substantial quarterly publication.

I want to thank and welcome Virginia Bryant, who will take the reins and begin her own work as editor-in-chief. She’ll be working with the TSLL Editorial Board and the TSLL staff, with whom I have really enjoyed working over the years. Virginia has the experience, dedication and high level of competence to ensure continued success of our beloved TSLL. Please thank her with me for her continuing contributions to our field. I am also so appreciative of and thankful for Cindy May and Julie Stauffer, who make this publication a quality production in every way.

Continued on page 6
2008-2009 Officers, Committee Chairs, and Representatives

TS-SIS
Chair:
  Linda Tesar
  Vanderbilt University
Vice Chair/Chair-Elect:
  Chris Long
  Indiana University
Secretary/Treasurer:
  Wendy E. Moore
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  Florida A&M University
Bylaws Committee:
  Alan Keely
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Education Committee:
  Karen Douglas
  Duke University
Membership Committee:
  June Liptay
  St. Thomas University
Nominating Committee:
  Janice Anderson
  Georgetown University
Preservation Committee:
  Marilyn Estes
  Washington College of Law
Serials Committee:
  Carol Avery Nicholson
  Univ of North Carolina Chapel Hill

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  Indiana Univ. at Bloomington
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Members-at-Large:
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  Yale University
  Elaine Bradshaw
  University of Oklahoma
Education Committee:
  Michael Maben
  Indiana Univ. at Bloomington
Local Systems Committee:
  Elaine Bradshaw
  University of Oklahoma
Nominating Committee:
  Susan Goldner
  Univ. of Arkansas at Little Rock
OCLC/RLIN Committee:
  Keiko Okuhara (co-chair)
  University of Hawaii
  Ming Lu (co-chair)
  Los Angeles County
Special Committee on Record Sharing:
  Pat Callahan
  University of Pennsylvania
Web Advisory Committee:
  Kevin Butterfield
  College of William and Mary

Editorial Board
SIS Representatives
OBS-SIS:
  Ellen McGrath
  Univ At Buffalo, State Univ of NY
  Janet Hedlin
  Michigan State University
OBS and TS-SIS Representatives
  Ellen McGrath
  Univ At Buffalo, State Univ of NY
  Janet Hedlin
  Michigan State University

TS-SIS:
  James Mumm
  Marquette University
  Gwen Gregory
  John Marshall Law School

ACLS Representative to NISO (National Information Standards Organization)
  Mary Alice Baish, Georgetown University
From the Chair

Online Bibliographic Services
Special Interest Section

A number of years ago I was the OBS OCLC Committee chair. I began my first column quoting Corporal Jack Jones from the BBC comedy television series Dad's Army. Whenever Corporal Jones wanted to say something, he always asked the Captain for “Permission to speak, sir!” So in the spirit of Corporal Jones and in recognition of time as the OCLC Committee Chair, I ask for “Permission to speak.”

I am very honored and humbled to assume the position of chair of the Online Bibliographic Services Special Interest Section. Colleagues I consider close personal friends, and individuals I have looked up to for many years have gone before me doing this job. In particular I want to thank our past chair, Andrea Rabbia, for her help and guidance—she has left some very large shoes for me to fill. Andrea deserves your thanks and appreciation for the work she has done for OBS—she has mine. Also, I want to acknowledge the debt I feel to Ellen McGrath. Ellen was the one who first pushed me to become more involved in leadership roles with OBS, first during her time as chair, and later when she was chair of the Nominating Committee. Thank you Ellen for the influence you have had on my involvement in OBS.

We have dedicated board members, committee chairs, and representatives that do much of the work of the SIS. Corinne Jacox has completed her term as a member-at-large on the OBS board, and Susan Goldner has completed her year as the past chair. In addition, the committee chairs and representatives that are stepping down include Richard Jost (Nominating), Elaine Bradshaw (Local Systems), JoAnn Hounshell (OBS/TS Joint Research Committee), and Janet McKinney (TSLL board). Thank you for your service to OBS.

The new members of the OBS Board are Patricia Sayre-McCoy (vice-chair/chair-elect) and Elaine Bradshaw (member-at-large). The continuing members of the board are Andrea Rabbia (past chair), Mary Strouse (Secretary/Treasurer), and Susan Karpuk (member-at-large). The committee chairs and representatives are:

- OBS/TS Joint Research Grant Committee Chair: Ruth Funabiki (2007-2009)
- OBS Nominating Committee Chair: Susan Goldner (2008-2009)
- OBS Web Advisory Committee Chair: Kevin Butterfield (2007-2009)

Thanks again for your willingness to serve OBS.

This is the conference issue of TSLL for the just completed annual meeting in Portland. However, I am focused on the 2009 meeting in Washington DC as we prepare our program proposals for that meeting. OBS has sponsored or co-sponsored six program proposals for Washington DC, and I greatly appreciate all the work that has been done by the coordinators and the OBS Education Committee. The six programs are:

- The TOC Market Report: Undervalued TOCs Yield Huge Dividends
- Taking the Aggravation Out of Aggregators: An Update on Aggregator-Neutral Bibliographic Records
- MarcEdit: A Magic Wand for MARC Records
- Can Anyone Police File Sharing: The Creation of AALL’s Proposed Ethical Record Sharing Policy
- OCLC’s Terminology Service: A Magic Bag of Words
- Latest Trends in Library Automation: Building Creative and Inspiring Discovery Platforms

The Annual Meeting Planning Committee will inform us which programs have been accepted sometime in early October.

At our business meeting in Portland, the bylaws revision was approved by the membership. With our new streamlined bylaws, our procedures manual will become much more important to the operation of the Section. I want to see us upgrade and improve the procedures manual this year. Also, there is some discussion concerning the future of the joint TS/OBS/CS/
RIAPS reception at the Annual Meeting. As I write this, we are conducting a survey of the membership of the four sections. This will be a topic of discussion among the four sections during the coming year. Even though the survey will have been completed by the time you read this, you may still email me any comments you have about the reception.

I thank you for giving me permission to speak. OBS is clearly on the cutting edge of the future of law librarianship when you examine the number of our programs that have been selected and the topics of those programs. I am excited about this coming year, and I hope you are as well.

Michael Mahen
Indiana University Law Library

From the Chair

Technical Services Special Interest Section

I was pleased to see many of you in Portland. The city was absolutely beautiful. The air was so clear and pleasant. Coming from the sweat bowl that is Nashville in July, I greatly enjoyed the lack of humidity and air-quality warnings. As you’ll read from the reports in this issue, the programming was excellent. Congratulations to our 2008 Education Committee, the speakers, moderators and coordinators on a job very well done! I’d also like to extend my thanks to the chairs and moderators of the more than twenty TS-SIS committee and group meetings held in Portland. These meetings are truly the heartbeat of the section.

This year’s Joint Reception was also a resounding success. The food was plentiful and delicious, the atmosphere cordial and relaxed. Huge thanks go to Marie Whited for chairing the reception committee and Carmen Brigandi for assisting Marie with pulling off a wonderful event. As you may have seen from messages on the TS discussion list, the TS and OBS executive boards received a suggestion that we consider eliminating or canceling the reception. In the shortened conference schedule, the “Alphabet Soup” reception (sponsored by Innovative Interfaces, Inc.) occupies the same night as the conference-wide opening event. This year in Portland, it also conflicted with four different alumni/friends receptions. The boards of the sections involved, TS, OBS, RIPS, and CS, conducted a survey in August to gauge member opinion. The four boards will be studying the survey responses carefully and consulting with each other to determine the best outcome for the future. Stay tuned.

I hope many of you had the opportunity to attend the webinar sponsored by the TS-SIS Ad-Hoc Committee on Professional Development on August 14th, Redesigning Technical Services: Working in a Hybrid Environment, with Mary K. Dzurinko as the featured speaker. The webinar, made possible by a grant from the AALL/BNA Continuing Education Grant Fund, had 148 attendees. What an excellent achievement for the committee’s first effort! Many thanks to the committee chair, JoAnn Hounshell, and committee members Janet Camillo, Pam Deemer, Jason Eiseman, Donna Lombardo, and Barbara Ost for submitting the grant request and creating the program. If you were unable to attend the webinar, the presentation is available at: https://aall.webex.com/aall/lsr.php?AT=pb&SP=EC&rID=1057917&rKey=450CF50A793FE9CE. If you have ideas for programs or workshops outside of the annual meeting, please contact a member of the committee. As a section, we want to develop programs that meet the educational needs of our membership and take advantage of the grants available from AALL.

We learned in June that Brian Striman would be stepping down as TSLL editor in chief. (Thanks a lot, Brian, for doing this on MY watch!) Brian has done an excellent job with TSLL for the last four years and I know the entire section is grateful for his dedication, leadership and creativity. Brian, thank you so much for producing such a quality publication. Over the course of the next issue or so, Brian will be handing the reins over to Virginia Bryant. Cheers to you for taking this on, Virginia! And thanks to Cindy May and Julie Stauffer for continuing on as Virginia’s valuable team.

We also have two new discussion list managers for the TS-SIS lists and another significant change to mention. Mira Greene ably served as our discussion list manager for several years. Last year, Mira accepted a position outside law librarianship and away from the University of Tulsa where she had hosted our smaller lists. In July, I appointed two new co-managers, Smita Parkhe and Alan Keely. As one of their first acts, Smita and Alan transferred the smaller lists from the University of
Tulsa to servers at AALL. Thanks and best wishes to Mira in her new position and thank you to the University of Tulsa for hosting our lists in the past. Welcome to Alan and Smita and “good job!” on the seamless transition.

The Education Committee for the 2009 meeting in Washington, D.C. and its chair, Karen Douglas, have already been hard at work. Karen and her committee members (Carol Avery Nicholson, Karen Nuckolls, Brandi Ledferd, Marilyn Estes, Miriam Childs, Sean Chen, and Ajaye Bloomstone) submitted seven program proposals and two workshop proposals for AMPC to consider. The proposals cover a wide range of subjects with something of interest for every group in the section. Thanks to the Committee for all its hard work. We’re off to a great start for the D.C. meeting!

One of my goals this year is to find ways to include more firm, state, court, and county librarians in TS-SIS programs and activities. As each new committee is formed, TS-SIS leadership tries to include a representative from each type of library. Usually, it’s a challenge to find new volunteers from firm libraries or the state, court, and county library group. If you are a librarian from one of these and you have ideas about involving more librarians from your type of library in TS-SIS activities, please contact me. I’d also love to hear from you if you’d just like to get more involved. There are always opportunities for member involvement in TS-SIS.

I know they’ve been thanked before, but I’d like to add my note of gratitude to our out-going officers: Sima Mirkin, secretary/treasurer; Jean Pajerek, Cataloging and Classification Committee chair; Jan Anderson, Preservation Committee chair; Rhonda Lawrence, past chair; and Marie Whited, member at large. I truly enjoyed working with each of you over the past year and hope you’ll stay involved so we can all benefit from your wisdom. A special thanks to immediate past chair, Alan Keely. TS-SIS is better for having had you as chair this past year. You were a fabulous mentor and role model — you’ll be a very hard act to follow. Thanks, too, for the new TS-SIS chair’s gavel! So far, I haven’t had many opportunities to use it, but I’m hoping the day may soon come ...

Finally, I’d like to welcome our new officers: Chris Long, vice chair/chair-elect; Wendy Moore, secretary/treasurer; Betty Roeske, member at large; Karen Nuckolls, Cataloging and Classification Committee chair; Marilyn Estes, Preservation Committee chair; Ajaye Bloomstone, serving a second term as Acquisitions Committee chair; Linda Sobey, Awards Committee chair; Barbara Henigman, new TS representative to the Joint Research Grant Committee; June Liptay, Membership Committee chair; Jan Anderson, Nominations Committee chair; and Gwen Gregory, the newest representative on the TSLL Editorial Board. Thank you so much for agreeing to serve.

I am truly honored (and still a bit surprised) that you have entrusted me with the stewardship of this wonderful section. Please contact me if you have ideas or suggestions for TS-SIS or if you’d like to become more involved in section activities.

Linda Tesar
Vanderbilt University

From the TS-SIS Past Chair

Now that my term as chair of the AALL Technical Services SIS has ended, I would like to express my gratitude to the Executive Board, and to you—the membership of TS-SIS, for your role in making my term as TS-SIS chair such an exciting and productive one. I truly believe that the 2007-2008 TS-SIS Executive Board was an exceptional group of individuals. Their hard work and dedication to the TS-SIS made my job all that much easier. I also enjoyed getting to know and working with many of you this past year. While I have been humbled by the accolades of the past months, I want you to know that I couldn’t have done what I did without your support, dedication, and hard work. For that, I am very grateful.

I also want to thank everyone for their contributions towards making the 2008 AALL annual meeting in Portland, Oregon one of the best AALL meetings in years. As the meeting unfolded, I began to feel that this meeting was going to be special. The hard work, the planning, the phone calls and the emails— all paid off handsomely. Everything ran like clockwork. Many of you commented on how good the meeting was this year and how much you enjoyed all the programs.

Again, please accept my heart-felt thanks for your dedicated service this past year and for your part in making the TS-SIS the best SIS in AALL.

Sincerely,
Alan Keely
Past Chair, AALL TS-SIS
Associate Director for Collection Services and Systems
Professional Center Library, Wake Forest University
The Renee D. Chapman Memorial Award for Outstanding Contributions in Technical Services Law Librarianship is presented at the annual meeting of the American Association of Law Libraries to an individual or group in recognition of achievement in an area of technical services, for services to the Association, or for outstanding contributions to the professional literature.

I looked out at the audience at our meeting in Portland and saw that many of our members are too young to have known Renee Chapman, so I want to say a few words about her. I had the privilege of knowing Renee through several years of AALL activity, and then subsequently as a colleague at Cornell before she was killed in a car accident.

Renee was one of those quiet leaders – extremely competent in her chosen area of librarianship, committed to professional development for herself and others, and willing to take the time to be involved. She was especially interested in continuing education, and in making sure that AALL conferences included a variety of technical services programs. She chaired the Technical Services SIS in 1988/89, now twenty years ago, and one of her goals that year was to make the conference programming the best it could be. She was a strong chair, and she succeeded.

The characteristics I’ve described for Renee apply equally to this year’s Chapman Award recipient, Joe Thomas. Joe is also a quiet leader, someone who has worked in the AALL trenches for fifteen years. He has been a particularly strong volunteer in AALL’s Technical Services SIS, serving on several committees before being elected Chair of the Section. As with most people who move into leadership positions, Joe has done his share of small and large tasks. These include planning and reporting on educational programs, making presentations, and serving as an editorial board member for the *Technical Services Law Librarian (TSLL)*. He chaired the SIS in 1998/99.

I want to highlight three specific areas of writing that in my mind make Joe deserving of the Chapman Award – his production of a Members’ Briefing on the state of technical services law librarianship in 2000, his editorship of *TSLL* from 2001-2004, and his brilliant writing of the Miss Manager column in *TSLL*.

When I was AALL President in 1999-2000, I wanted to present a Members’ Briefing on technical services as an insert in an issue of the AALL Spectrum. My goal was to highlight the skill and innovation that technical services librarians bring to the acquisition, organization and preservation of materials. In addition I wanted to highlight the vital role technical services law librarians play as representatives of AALL and law librarianship in the general library community. Joe served as the editor of this briefing, writing a creative lead article and bringing in opinions from other colleagues. The final product (April 2000) presented a comprehensible and positive view of technical services, and it exceeded my expectations.

I was pleased, therefore, when Joe agreed to be the editor of *TSLL* in 2001, a position he held until 2004. I had always enjoyed Joe’s written work, from the more scholarly treatment found in his *Law Library Journal* article on cataloging reform to the regular columns written for *TSLL* when he was TS-SIS chair. And, although this is probably not a well-kept secret, Joe was for several years the anonymous author of the Miss Manager column in *TSLL*. This column presented a substantive discussion of management issues, solidly grounded in the literature but written in a humorous and entertaining style. It not only demonstrated incredible talent, but it also indicated a major commitment of time and energy to scholarship and to our profession. As both a writer and editor, Joe’s contributions to *TSLL* are significant and worthy of recognition.

Joe Thomas is an exemplary recipient of the Chapman Award—for his leadership in technical services activities, his service to the profession, and his diverse contributions to the literature. Please join me in congratulating him.
All four issues for volume 33 were published and are available on the TSLL website in PDF format. Due to continuing publication delays, of which the editor is ultimately responsible, the editor-in-chief notified the editorial board of his decision to step down as soon as the board approves the best suitable replacement. The continuing excellent contributions of Cindy May, Julie Stauffer and Martin Wisneski, as well as all of the regular columnists and guest authors, are to be recognized and applauded.

Several changes in columnists occurred during the reporting year, and the columnists who have stepped down also need to be recognized for their outstanding work: Margie Maes (Collection Development), and Donna Rosinski-Kaus (PLL). Kevin Butterfield switched back to being columnist for The Internet column. The TechScans column has instituted a blog from selected content that is gleaned from the work of its contributing authors. The blog is available at the TSLL website. Columns remaining vacant, or with upcoming vacancies, include: Description and Entry (vacant since 2006), Collection Development (final column by Margie Maes was June 2008), Management (final column by Caitlin Robinson will be December 2008), Research and Publications (vacant for the reporting year, with replacement columnist Hollie White beginning with December 2008 or March 2009), PLL (vacant since March 2008, with replacement columnist Beth Geesey Holmes beginning with December 2008), and Serial Titles (will be vacant beginning with December 2008). The board will review the columnists’ terms at its Portland meeting as well. The MARC Remarks column changed from quarterly to “as needed,” depending on what George Prager determines is suitable for publication.

Volume 32, no. 1 (September 2006) was the first annual issue to be designated as the “conference issue.” The annual conference issue will continue, providing a valuable reporting of the events and activities of OBS and TS. There will be no regular columns in conference issues. This relieves the columnists from the pressures of producing a column soon after the AALL Annual Meeting, along with their other workloads and commitments. The conference issue has been well received, with no negative feedback from the readership to this point.

Outstanding administrative matters for TSLL include: completion of the Author’s Guide to Stylistic Conventions, and completion and approval from the TSLL Board of the TSLL Structure and Policies document, which still needs considerable updating. The editor-in-chief must also provide the Board with detailed options regarding format (i.e., a possible move from the PDF “print-look” format to a true web-based format). The Board should also discuss the possibility of TSLL columns being made available as RSS feeds as soon as the TSLL staff finalizes them, rather than waiting for the entire issue to be published.

Finally, the TSLL thirty-year index was completed by Susan Goldner and Virginia Bryant, and is available on the TSLL website. The TSLL wiki has been used as a tool to recruit Annual Meeting conference reporters. Other TSLL wiki pages may be deleted if no longer useful.

Submitted by
Brian Striman
TSLL Editor-in-Chief
Chair, TSLL Editorial Board

Technical Services Special Interest Section
2008 Annual Business Meeting — Draft Minutes

The meeting was called to order at 5:30 pm by Chair Alan Keely.
A quorum was verified. Minutes of the 2007 Business Meeting in New Orleans were approved unanimously.

Secretary/Treasurer Report
Sima Mirkin reported the online election results. 210 ballots were cast by the April 30 deadline for a return rate of 38%. Chris Long is the new Vice-Chair/Chair Elect, Wendy Moore the new Secretary/Treasurer, and Betty Roeske the new Member-at-Large. The projected balance for August 1, 2008 was $12,072.
Standing Committee Chairs Reports

Acquisitions Standing Committee – Ajaye Bloomstone

Ajaye reported that the Acquisitions Committee met from 7-8:30 am on Monday, 16 July 2008 to discuss current and future program development.

The committee reviewed results of the full-day Acquisitions Workshop (held Saturday, 14 July 2008). Prior to the registration deadline, all spaces in the workshop were reserved, and headquarters decided to open up several additional spaces, which were also filled. Attendees evaluated the workshop very positively.

Two task forces have been designated: Anne Robbins (University of Illinois) and Lisa Arm (Boston University) are working with Eleanor Cook (Appalachian State, and now at East Carolina University) on the contribution of legal vendor information to the revamped ACQWEB website. The existing contents of ACQWEB are under a review / updating process, prior to the addition of new content. Several committee members have volunteered to assist with this project, which is an ongoing cooperative effort between ALA ALCTS and AALL TS-SIS. Members of both organizations have been heavy ACQWEB users in the past. Eric Parker (Northwestern University) is the Acquisitions Committee representative to a pan-SIS project (along with ALL and PLL) charged with obtaining current collection development policies. Martin Wisneski, as the TS-SIS webmaster, is assisting by making these policies accessible to AALL members through the TS-SIS website.

On Tuesday, 17 July, from 12-1:30 pm, the Acquisitions Roundtable presented a TS-SIS-sponsored program, “Tips and Tricks for Successful Vendor Negotiation.” Speaker Anne Robbins suggested dealing with vendors through a variety of communication methods, and Emerita Cuesta (University of Miami) provided information to assist acquisitions librarians when dealing with Latin American vendors of legal materials.

Cataloging and Classification Standing Committee – Jean Pajerek

Jean referred the group to the full text of her report on the TS-SIS website, which outlines accomplishments of the committee’s subgroups. The Descriptive Cataloging Policy Advisory Working Group was chaired by Ann Sitkin, the Classification and Subject Policy Advisory Working Group by Chris Tarr, and the Task Group on Vendor-Supplied Bibliographic Records by Angela Jones. Dan Blackaby assumed leadership of the New Catalogers’ Roundtable, and Sarah Yates continued as leader of the Rare Book Cataloging Roundtable. Jean reminded attendees of the committee’s business meeting on July 16, and noted that Karen Nuckolls is the new committee chair.

Preservation Standing Committee – Janice Anderson

Janice reported that at this year’s Annual Meeting TS-SIS sponsored two afternoon programs on preservation, one on print materials in repositories and the other on digital preservation. Both were very well received. There was also an archives workshop, and the comments that are coming in are very favorable. Janice reminded the group about the Preservation Roundtable on July 16 and introduced Marilyn Estes, who is taking over as chair.

Serials Standing Committee – Carol Avery Nicholson

Carol referred the group to the full text of her report on the TS-SIS website. She reported that the Project Counter Task Group worked hard this year under the leadership of Shyama Agrawal. Nancy Cowden and Ellen McGrath compiled a list of serials-related articles for submission to a special centennial issue of Law Library Journal. The Amazing Technical Services workshop, which Carol co-coordinated, was fully subscribed. It looks like everyone enjoyed it, but the evaluations will detail the participants’ experience. The Exchange of Duplicates program will continue, with Bonnie Geldmacher stepping down and Michele Pope volunteering to take over as chair. Carol thanked Bonnie for her work, then concluded her report with reminders about upcoming serials programs and the Serials Standing Committee business meeting at the conference.

Awards – Kevin Butterfield

Kevin announced this year’s TS-SIS grant awards winners:

- Marla Schwartz Grant recipient
  The Committee awarded the Marla Schwartz Grant to Jennifer Tsai, Head of Technical Services at Golden Gate University Law Library.
- TS-SIS educational grant recipients
  The winners of educational grants this year are:
  Hollie White, a Ph.D. candidate in Information Sciences at the University of North Carolina at Chapel Hill
  Chris Pickford, a catalog librarian at San Diego County Public Law Library

Kevin reported that the Awards Committee received many grant applications this year, and thanked the TS-SIS Board for allotting substantial grant funding.
Presentation of the Renee D. Chapman Memorial Award to Joe Thomas

Margie Maes announced that this year’s Renee Chapman Award recipient is Joe Thomas, Head of Technical Services at the Kresge Library, Notre Dame Law School. Margie described Joe as someone who has worked in the AALL trenches for fifteen years. He has been a particularly strong volunteer in AALL’S Technical Services SIS, serving on several committees before being elected chair of the section for 1998/1999. Joe has done his share of both large and small tasks. These include planning and reporting on educational programs, making presentations, and serving as an editorial board member for TSLL. Margie highlighted three specific areas that make Joe deserving of the Chapman Award: his members’ briefing on the state of technical services law librarianship in 2000, his editorship of TSLL from 2001 to 2004, and his brilliant writing of TSLL’s Miss Manager column. His contributions to TSLL as both a writer and an editor are significant, and worthy of recognition. Joe Thomas is an exemplary recipient of the Chapman Award for his leadership in technical services activities, his service to the profession, and his diverse contributions to the literature.

Joe Thomas responded that although the meaning of the Chapman Award is not obvious to just anyone, this award comes from his peers, from people who understand the nature of technical services everyday work. This makes it important to him. Joe added that to be nominated by Margie Maes is really an honor. He thanked all the previous recipients of the award because their work helped make all the rest of us better librarians. This award, Joe added, will give him the incentive to try to live up to it. He thanked his mentors and colleagues whom he considers to be very much part of this award, and thanked the committee for this recognition.

TSLL Report – Brian Striman

Brian announced that he is stepping down as editor-in-chief of TSLL, effective when a new editor is appointed. He recognized Cindy May, Julie Stauffer and Martin Wisneski for making a fabulous TSLL staff. He said that being an editor-in-chief is a major undertaking; it is a lot of work, but it’s extremely rewarding. The two things that he wanted to accomplish in his four years as editor were, first, to move from print to electronic format, and second, to move TSLL up a notch, from a newsletter to a substantial publication that the section can be proud of. He regretted that TSLL has not yet won the SIS newsletter award, but expressed his hopes that it would achieve that goal in the future.

Brian recommended that readers pay special attention to the incredible TechScans column, which also comes out in blog format, and reported on future plans to deliver TSLL columns as RSS feeds. He noted that the official TSLL report will be on the TSLL website, and thanked all the columnists for their wonderful job.

Brian received a round of applause for the work he has done on TSLL, propelling it to its status as one of AALL’s premiere publications.

Chair’s report – Alan Keely

Alan reported that this has been a great year. He has submitted his full report, in which all the year’s accomplishments are detailed, and everyone will be able to read it when it’s published. At today’s meeting, he highlighted a few of the year’s major initiatives.

One of the most important things that happen this year was that the Board established a Task Force on Continuing Education Opportunities to take advantage of funding that AALL was offering for continuing education opportunities outside of the Annual Meeting. With JoAnn Hounshell as chair, the committee put together a successful grant proposal, and on August 14 the first educational program will take place: a webinar on redesigning technical services. JoAnn received a round of applause for this accomplishment.

Another major accomplishment this year was the revision of the TS-SIS brochure, for which AALL provides funding every third year. This brand new, hot-off-the-press brochure is available for everybody to use to recruit new members. There is lots of information in the brochure about TS-SIS, its committees, and its recent programs. The Membership Committee was congratulated for its work on the brochure.

Alan thanked the Education Committee for putting together a wonderful set of programs and workshops for this conference. There were few conflicts, and the workshops were fully subscribed. Everybody learned a great deal and had a great time. Alan asked the Education Committee members to stand up, and they were applauded for all their hard work.

Alan reported that one of his goals for TS-SIS this year was to bring in more young members in leadership positions, and now there are a number of younger members on several committees.

Alan concluded by saying that chairing TS-SIS was one of the most rewarding experiences of his career, and that he really appreciates the trust that the members put in him.
Other Old Business

*A few Words from Our Old Chair*

Alan Keely asked members to stand and be recognized for their contributions to this year’s TS-SIS activities. He acknowledged the work done by retiring Board members Sima Mirkin (Secretary/Treasurer), Marie Whited (Member-at-Large), Janice Anderson (Preservation Standing Committee Chair), Jean Pajerek (Cataloging and Classification Committee Chair), and Rhonda Lawrence (Past Chair). Each of them did a fabulous job. Alan gave special thanks for the help he received from Linda Tesar, his “godsend” Vice Chair/Chair-Elect.

New Business

*Passing of the Gavel*

After finishing his speech, Alan presented TS-SIS with a new gavel on which is engraved “AALL Technical Services SIS 2008.”

*A Few Words from Our New Chair*

Linda Tesar thanked Alan on behalf of the membership for an excellent year, and for being a wonderful role model for her. Linda also recognized the work of the Ad Hoc Committee on Continuing Education and encouraged members to submit their ideas for future programs to its members. Her goal is for this committee to continue applying for grants that will help keep technical services continuing education strong. In conclusion, Linda encouraged librarians from private, state, court, and county law libraries to volunteer to work on TS-SIS committees. She then wielded the gavel and announced the meeting adjourned.

Meeting adjourned at 6:30 pm.

Respectfully submitted,
Sima Mirkin
Secretary/Treasurer

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Online Bibliographic Services Special Interest Section

2008 Annual Business Meeting

OBS Chair Andrea Rabbia called the meeting to order at 5:30 pm.

In her welcome, Andrea thanked the officers, representatives and committee chairs, especially the two outgoing OBS board members, Corrine Jacox and Susan Goldner. Andrea also extended a special thank you to several members who stepped in to review and comment on NISO standards on an ad hoc basis during the year.

Andrea next called for any corrections to the minutes of the 2007 Business Meeting as printed in the September 2007 issue of TSLL. The minutes were approved as printed.

Election and Finance

Mary Strouse gave the Secretary/Treasurer’s report. An online election was held between April 25 and May 9. By a majority of those voting, Pat Sayre-McCoy was elected Vice Chair and Elaine Bradshaw was elected Member at Large.

- 2007 Annual meeting expenses not reimbursed by vendors: $841.35 [Note: subsequently received additional $500 vendor reimbursement – MMS 12/16/08].
- 2007 member dues received: $2,385
- Balance as of March 2008: $4,558.49 (not counting 2008 joint reception money)
- Non-reimbursable 2008 projected expenses: $1,038.50 including audio-visual charges for batchload analysis program and cart and screen for OCLC update.

Discussion: Ismael Gullon asked the size of the current OBS membership. Andrea estimated membership at about 320. [Membership as of 4/11/2008 was 327 – MMS]

Bylaws

Ismael Gullon read the report of the Special Committee on Bylaws and Governance. Committee members were Susan Goldner (Chair), Andrea Rabbia (ex-officio), Ismael Gullon, Richard Jost and Anne Meyers. Although the bylaws revision effort began with the formal merger and renaming of the OCLC and RLIN committees, the Committee ended up with a
complete revision and streamlining of the OBS Bylaws to bring them into line with the AALL Model Bylaws as revised in 2006. Under this model, specific procedural details are migrating from the Bylaws to the SIS Procedures Manual and the calendar. Once the Bylaws are approved by the membership, both these documents must also be revised. The proposed bylaws have been approved by the AALL Bylaws Committee and the OBS Board.

Chair Andrea Rabbia made a motion that the proposed bylaws be adopted as printed on the OBS website. The motion was seconded by multiple voices from the floor.

Andrea opened discussion of the proposed bylaws. Andrea explained the procedure for adoption. The proposed bylaws were posted on the OBS website, along with a detailed discussion of changes. The vote was publicized via announcements on the OBS listserv and instructions were given for submitting proxies to the Secretary/Treasurer for members who were unable to attend.

Andrea next called for a yes/no vote to approve the proposed bylaws by show of hands. A total of 25 votes were recorded. The proposed Bylaws were unanimously approved by those attending or voting by proxy.

**TSLL Report**

Brian Striman gave the TSLL report. Brian will be stepping down after four years as editor of TSLL, following the conference issue and the naming of a new editor. He will be available to assist with the new editor’s first issue. He is expecting a smooth transition.

Two goals suggested by the latest SIS surveys are currently under discussion by the TSLL Board: Increase the timeliness of information to the membership and streamline or reduce graphics. One idea to increase timely distribution is to create RSS feeds for all the major TSLL columns. This will allow the individual columns to be posted and distributed as soon as they are ready, in advance of the production delay to produce the entire issue. Reducing the graphics would give TSLL a more substantive look and feel, as well as simplifying layout. Four columns currently need editors: Serials Titles, Acquisitions, Description and Entry, and Collection Development. Finally, Brian wanted to acknowledge the contributions of Cindy May and Julie Stauffer in proofreading, layout and other editorial assistance.

Discussion: Pat Sayre-McCoy asked if migrating columns to RSS feed might jeopardized the coherence of TSLL as a newsletter. Brian responded that the TSLL Board has decided not to change either the frequency (quarterly) or the format (PDF) of TSLL. The Board recognizes that TSLL plays an important role in providing a complete history of the activities of the special interest sections. RSS feeds are seen as a tool to give members advance access to the columns that will appear formally in TSLL. They will operate similarly to the existing RSS feed for the techscans blog. The techscans RSS feed currently has 54 subscribers. Corinne Jacox asked for a show of hands of those who read the techscans blog. Approximately three quarters of those present raised their hands.

**Committee and Representative Reports**

*Andrea Rabbia gave the 2008 Education Committee report.*

Committee members include Andrea Rabbia (chair), Georgia Briscoe, Kevin Butterfield, Janet Ann Hedin, Richard M. Jost, Ming Lu, Michael Maben, Ellen McGrath, Sharon L. Nelson, Keiko Okuhara, Caitlin Robinson, Karen Selden and Sally Wambold.

OBS Submitted eleven educational program proposals and co-sponsored a twelfth. Five OBS programs and one co-sponsored SCCLL program were accepted:

- Encore, Enterprise, Primo & WorldCat Local: Explore the Evolving Discovery Tools for Your Catalog
- The Good, The Bad, the Ugly: Rethinking Bibliographic Bibliographic Services in the 21st Century
- Explore the Effective Use of Cataloger’s Desktop [co-sponsored by TS-SIS]
- Explore the Effective Use of Classification Web [co-sponsored by TS-SIS]
- Exploring Relevancy Ranking Systems in Search Engines on the Web and in our OPACs: What They Are--How They Work [co-sponsored by CS-SIS and TS-SIS]
- Using WorldCat.org’s Social Software to Promote the Law Library
- OBS self-sponsored three programs that were not accepted:
  - Demystifying Batch-Load Analysis: What You Need to Know About Vendor-Supplied Bibliographic Records (*co-sponsored and co-funded by TS*)
  - You want me to do what? Bridging the gulf and building understanding between technical services and public services managers.
Vice-Chair Michael Maben gave the 2009 Education Committee report. Committee members include Michael Maben (chair), Georgia Briscoe, Kevin Butterfield, Janet Ann Hedin, Richard M. Jost, Ming Lu, Ellen McGrath, Sharon Nelson, Keiko Okuhara, Caitlin Robinson, Pat Sayre-McCoy, Karen Selden and Sally Wambold.

The Education Committee has not yet met at the annual meeting. It organized and began work in January 2008. Five proposals are substantially complete and a sixth is being worked on.

Committee Chair Elaine Bradshaw gave the Local Systems Committee report. The committee sponsored a vendor showcase focusing on discovery platforms. Representatives from Innovative Interfaces, ExLiris and Sirsi/Dynix participated. The Local Systems committee is now seeking a new chair.

Andrea Rabbia read the Nominating Committee report on behalf of Richard Jost. Nominating Committee members were Richard Jost (chair, Univ. of Washington), Calmer D. Chattoo (Univ. of Miami), and Marilyn Nicely (Univ. of Oklahoma).

The Committee solicited the following candidates: Patricia Sayre-McCoy (Univ. of Chicago) for Vice-Chair/Chair-Elect and Elaine Bradshaw (Univ. of Oklahoma) for Member-at-Large. Both candidates were elected in May 2008.

Ruth Funabiki gave the OBS/TS Joint Research Grant Committee report. Committee members were Ruth Funabiki (Chair), Richard Amelung (ex-officio), Kathy Faust (2007-08), JoAnn Hounshell (2007-08), Chris Long (2007-09), and Patricia Satzer (2007-09).

OBS and TS-SIS each agreed to make available $500 for award of a 2008 research grant. However, no applications were received by the June 15 deadline.

At its 2008 meeting, the committee will discuss renewed efforts to publicize and promote the grant program.

Keiko Okuhara gave the OCLC/RLIN Committee report. The committee is sponsoring an update session and a roundtable on Tuesday, July 15.

OCLC/RLIN Update: Glenn Patton will discuss new developments, focusing on institutional records and the OCLC digital archive product. Mindy Pozenel will give the WorldCat Local update, and take questions.


The Committee also sponsored an educational program on discovery platforms (Program A-5: Encore, Enterprise, Primo and WorldCat Local: Explore the Evolving Discovery Tools for Your Catalog).

George Praeger’s MARBI Representative report was given in the TS-SIS Cataloging and Classification Committee meeting and not repeated here.

Kevin Butterfield gave the Web Advisory Committee report. Committee Members: Kevin Butterfield (Chair), Katrina Piechnik, Patricia Satzer

This year the committee has focused on fixing links and bringing the website up-to-date. The committee is filling in past meeting minutes and committee reports. The OBS paper archive has been mined, but reports from a few years are still missing. Kevin will put out a general call to the membership for the missing years.

The Web Advisory Committee will take over maintenance of the OBS Facebook page and might look at other social networking sites.

Discussion: Ismael Gullon asked if we couldn’t have a web archive of past versions of the bylaws. Mary Strouse pointed out that previous bylaws are on the site, but only linked at the bottom of the current version of the bylaws. The committee will look at making this material easier to find.

Phyllis Post reported as AALL Representative to the OCLC Members Council. AALL representation to OCLC Members Council has been on-again/off-again thing. At Andrea’s suggestion, the AALL Executive Board invited Phyllis Post to attend the October 2007 Members Counsel as an Observer. Because she lives in
proximity to Dublin, Ohio, Phyllis is able to attend Council meetings at no cost to AALL. Her status as Temporary AALL Observer has been extended through 2010.

Observers have no official status on the Council. All Council members are elected by the regional providers. Only in breakout sessions can an observer voice an opinion. The primary value of sponsoring an observer is that she can report to us on emerging trends and developments that might not otherwise be apparent.

OCLC is considering governance changes to reflect its evolution from U.S.-based bibliographic utility to global information provider. OCLC interacts with its membership differently inside and outside the US. While here the focus remains on access to WorldCat, the rest of the world is focused more on database access, social networking and library software. Thus, new OCLC initiatives include collaborative tools and WorldCat Local.

Discussion: Mike Maben attended the OCLC Members Council as chair of the OCLC committee. Even without official status, he found the experience useful mostly for the conversations with other member that took place in and around the official sessions.

_Pat Callahan gave the report of the Special Committee on Record Sharing._

Based on the response to last year’s surveys, the committee decided to draft guidelines for record sharing. The drafting team consisted of Pat Callahan, Joni Cassidy and Katrina Piechnik.

An outline was prepared and sent to the full committee, the OBS Board and interested individuals for comment. A preliminary draft of the guidelines was discussed when the committee met at the Annual Meeting.

When the guidelines are completed, they will be submitted for approval by the OBS Board.

For maximum impact, the guidelines might be submitted to the AALL Executive Board (to be adopted as a policy of the Association) before distribution to members and vendors.

Discussion: Perhaps the guidelines could be printed and distributed as a brochure similar to the guidelines on licensing. The guidelines could be submitted to the full SIS Council for approval.

_Anna Rabbia reported on the SIS Council meeting._

AALL offered the SIS VIP program again this year, and also introduced a one-day waiver of conference registration for invited guests. OBS considered using the VIP program to bring a NISO staffer to the conference, but did not pursue. Both the VIP program and one-day waivers for invited guests will be offered again next year.

Discussion: Pat Sayre-McCoy asked how many VIPs can be sponsored by the SIS and who pays expenses. We believe it is up to two per year for special interest sections. The rule is different for chapters. They are allowed one every other year. The VIP program covers conference registration, but not expenses, which must be borne by the participant and/or the SIS. One-day waivers for program speakers to attend other conference sessions are also available.

Last year, SIS-sponsored programs were not evaluated. Andrea will contact program coordinators by email to develop a standardized evaluation for this year’s OBS-sponsored program. The SIS Council will be asking the AALL Executive Board to include SIS-sponsored programs in the overall evaluation instrument for next year.

**New Business**

Andrea called for new business. She passed the OBS-SIS baseball cap to incoming chair Michael Maben. Michael thanked Andrea for all her hard work and accomplishments over the previous two years. As a token of the SIS’s appreciation, he presented her with a gift certificate to Powell’s Bookstore.

In his closing remarks, Michael said it was a humbling experience to follow outstanding past OBS chairs. Mike hopes to continue that tradition of excellence, and appreciates the members’ vote of confidence. He hopes in that same spirit that members will willingly answer his calls on behalf of OBS. He thanked everyone for coming.

Michael’s motion to adjourn the meeting was seconded from the floor. Without objection, the meeting was adjourned at 6:13 pm.

Respectfully Submitted,
Mary Strouse
December 16, 2008
Report of the AALL Representative to the American Library Association, Association for Library Collections and Technical Services, Cataloging and Classification Section: Description and Access (CC:DA)
Annual Meeting, Anaheim, June 28-30, 2008

Kathy Winzer
Robert Crown Law Library
Stanford University

This report is my last as the AALL representative to the American Library Association’s Committee on Cataloging: Description and Access (CC:DA). John Hostage will replace me, and a more knowledgeable and effective representative would be hard to find!

I would like to thank the Descriptive Cataloging Policy Advisory Working Group members who helped throughout the year with comments on the draft, advice, and encouragement, often with extremely short deadlines. The chair, Ann Sitkin, made sure that all of my requests for assistance were sent to the group, and her counsel and suggestions were always helpful and positive. John Hostage had the brilliant idea of setting up wiki for comments on the December draft of RDA, allowing participating members of the committee to place their comments under the various issues being discussed. Going forward, some of the ideas and suggestions that were entered into the wiki may help to formulate proposals for changes in RDA rules.

For the last few years the CC:DA has spent a lot of time and energy reviewing and commenting on the various drafts of RDA: Resource Description and Access, commonly called RDA, which hopes to replace Anglo American Cataloging Rules, 2nd ed. RDA emanates from the Joint Steering Committee for Development of RDA (JSC) which includes representatives from Australia, Canada, the United States, and the United Kingdom. Because the legal rules were on the agenda, I attended their October meeting in Chicago. At the start of the meeting, the editor of RDA proposed substantial changes in the structure and organization of the document. The changes were suggested to better align RDA with FRBR, and after some discussion, the JSC accepted the new structure. The new organization is provided on the JSC website at: http://www.collectionscanada.gc.ca/jsc/rda-new-org.html. Unfortunately, the legal rules were not discussed at the meeting, and I was sent off to work on examples for rules that consisted of the phrase: “To be discussed.”

In December and at the January meeting, CC:DA reviewed a draft of sections 2-4 and 9, which correspond to part B, access control in the previous structure. The Descriptive Cataloging Policy Advisory Working Group took advantage of a pbwiki set up by John Hostage. The wiki format allowed us to discuss the issues in an organized way with separate pages for treaties, court reports, and commentaries, as well as the uniform titles Laws, etc. and Treaties, etc. Trying to keep track of these disparate subjects was extremely difficult with email, where one message might include comments on several topics, and I very much appreciated John’s great idea. The comments entered in the wiki informed the comments I entered into the CC:DA wiki, and many were later incorporated into the ALA document that was sent to the Joint Steering Committee for RDA. In particular, AALL recommended that the rules for court reporters be simplified, and that the rules for treaties be both simplified and clarified. In response to the JSC request for alternatives to the uniform title conventions of “laws, etc.” and “treaties, etc.” we were unable to identify a practical alternative. These will remain until after the publication of RDA in 2009. The full ALA response to the draft is at: http://www.collectionscanada.gc.ca/jsc/docs/5rda-sec2349-alaresp.pdf (339 KB PDF), and the law rules start at 6.23 at the bottom of page 22. Also of interest are the comments on heads of government and heads of state. RDA follows AACR2 in using the language of the jurisdiction for heads of government, but using the language of the cataloging agency for heads of state. ALA suggests that access points for both be created in the language of the jurisdiction.

Part of the difficulty of providing meaningful feedback for the drafts of RDA has been the way drafts are issued. New draft chapters are issued (and sometimes reissued) for review in isolation, and understanding how (or whether) it will all work together is impossible. The JSC plans to release a full draft in October using the software of the final online version. We will have a three month period to comment on how the various parts of the whole work together. Comments on the actual rules will not be addressed until after publication. Once RDA is published, the three national libraries, some library educators, and a variety of libraries will spend some months testing to ensure that it is a workable and useful tool. Implementation will follow if the testing is successful, perhaps in early 2010. Task groups are now working on implementation and training issues that will ease the transition to the new rules. RDA training workshops tailored to law catalogers will be important in enabling law libraries to understand and follow the new rules. The new CC:DA representative will no doubt play an important role as we move forward.

Since the JSC is not planning to entertain any comments on RDA rules until after publication, AALL will have some time to prepare detailed proposals for rule changes that we identify in the October draft. Possible areas where we may want to
suggest changes include the rules for court reports, constitutions, and treaties. The JSC still wishes to eliminate the “etc.” from “Laws, etc.” and “Treaties, etc.” Although AALL did suggest a way to eliminate “etc.,” that suggestion did not go forward in the ALA report. Since AALL’s comments are in the wiki, we will still have the suggestion we formulated to consider in the future.

In addition to RDA, CC:DA is also considering next steps in response to the report from the LC Working Group on the Future of the Bibliographic Record. An ALCTS Task Group identified a number of recommendations which will require CC:DA participation. A few of these: Analyze cataloging standards & modify them to support data sharing; Make use of bibliographic data from foreign libraries, publishers, etc. that may not conform to U.S. standards; Share responsibility for original cataloging; Promote participation in PCC. In coming months the new representative to CC:DA from AALL will doubtless be asked to work on some of these issues as groups are formed to address them.

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AALL MARBI Representative Report
2007-2008

Prepared by: George Prager
New York University Law Library

Introduction

I attended the MARBI meetings held during 2008 at the American Library Association’s Midwinter Conference in Philadelphia and its Annual Conference in Anaheim. Both meetings focused on RDA, internationalization, and series.

Proposals No. 2008-05/1 - 2008-05/4 and related discussion papers are concerned with the mapping of RDA to MARC 21. While the discussions on this topic were extensive at both meetings, most of the decisions have been deferred until the ALA Midwinter 2009 Meeting, several months after the final draft of RDA is due to be published.

Internationalization of MARC 21 continues. Last year, the German and Austrian library communities proposed many changes to MARC 21 to accommodate their conversion from their proprietary format, MAB, into MARC 21. In this past year, two proposals have come from the National Library of Finland and one proposal and one discussion paper from the National Library of Spain. Both libraries are converting to MARC 21.

Series field 440 has been made obsolete! Field 490 and the 8XX series fields have a new subfield $3 for “Materials specified”, and the 8XX fields also have a new subfield $x for ISSN.

Lastly, there’s now a field in the MARC 21 format to record all facts related to copyright status (See MARC Proposal No. 2008-2 below).


The minutes are at: http://www.loc.gov/marc/marbi/minutes/mw-08.html.


Minutes for the 2008 ALA Annual MARBI meetings are not yet available as of June 9, 2008.

Proposals No. 2008-01 - 2008-04

MARC Proposal No. 2008-01: Representation of the Dewey Decimal Classification (DDC) System in MARC 21 formats
Changes were approved to the MARC 21 formats to accommodate the conversion of DDC classification data from a proprietary system into the MARC 21 formats. For further background on these proposals, see the discussion of No. 2007-DP-06 in last year’s AALL MARBI Representative Report.

MARC Proposal No. 2008-02: Definition of field 542 for facts related to copyright status in the MARC 21 bibliographic format.
This proposal grew out of 2007-DP05, also discussed in last year’s report. Field 542 has been defined to allow for the optional recording of detailed information about the copyright status of a work in one field, rather than having to spread
out the information over some or all of the following fields: 260 $c, 506, 540, and 017. Status: approved as amended.
The first indicator will be defined as “Privacy.”

MARC Proposal No. 2008-03: Definition of first indicator value in field 041 (Language code) of the MARC 21 bibliographic format
http://www.loc.gov/marc/marbi/2008/2008-03.html
When working on digitization or retrospective conversion projects, it is not always possible to determine whether or not a resource is or includes a translation. For this reason a new first indicator value (#) was proposed with a definition: “Unspecified/unknown” [whether item is a] translation.” This proposal has been approved as amended, with the definition changed to: “Unevaluated/no attempt to code.”

MARC Proposal No. 2008-04: Changes to Nature of entire work and Nature of content codes in field 008 of the MARC 21 bibliographic format
The National Library of Finland and many other Finnish libraries are now using the Voyager OPAC. They are converting their data from MARC 21-FIN to regular MARC 21. Three new codes have been approved for Nature of entire work and Contents: Books 008/24-27: Nature of contents, and: Continuing resources 008/24: Nature of entire work and 008/25-27: Nature of contents fields:

• “3” for Calendar [example: Georgia O’Keeffe Wall Calendar]
• “y” reinstated for Yearbook [This value had been made obsolete in the MARC 21 format in 1988, because it was found difficult to apply consistently]
• “6” for Comics/Graphic Novels [The Proposal called for “4”, but this value has already been used in Canadian MARC, so “6” was decided upon].

Also, Code 008/33 literary form for Books code “c” has been used for Comic strips in MARC 21, and this code will now be made obsolete.

RDA: Proposals No. 2008-05/1 - 2008-05/4 and related discussion papers
Proposal No. 2008-05 is subdivided into 4 “sub”-proposals, and has 4 related discussion papers. These all have to do with encoding RDA into MARC 21.

MARC Discussion Paper 2008-DP04: Encoding RDA, Resource Description and Access data in MARC 21
Proposal No. 2008-05/1: Encoding RDA: Introduction and Principles
This paper offers a useful theoretical framework on the issues involved with mapping RDA into MARC 21. Discussion Paper No. 2008-DP04 introduced this topic at the ALA 2008 Midwinter Meeting. An RDA/MARC Working Group was subsequently formed in March 2008 to develop proposals for changes to MARC 21 to accommodate RDA. Because the final draft of RDA has not yet been issued, the Working Group has also developed some discussion papers (2008-DP05/1-3) for those areas where the direction of RDA does not seem clear. In 2008-DP05/4, the Working Group presents several areas where no change to MARC 21 is required to accommodate RDA. These papers were presented at the June 2008 ALA Annual Meeting.

Proposal No. 2008-05/2: Identifying work and expression records in the MARC 21 Bibliographic and Authority formats
A new field 011 (Entity type) is proposed for the Bibliographic and Authority formats to identify the work, expression, and manifestation level of the record. Lack of field 011 in a record (the default) will indicate that the record is for a manifestation. The Committee decided to reconsider this proposal at the 2009 ALA Midwinter Meeting, when the full draft of RDA should be available. A different tag will be considered instead of “011”, as this field has already been used in the MARC format and is currently obsolete.

Proposal No. 2008-05/3: New content designation for RDA elements: Content type, Media type, Carrier type
These three elements will replace the general material designation (GMD) currently used in AACR2. This paper proposes defining Field 336 for content type in both the MARC authority and bibliographic formats, and then presents three options for including information on media and carrier type to be added to the record, also in textual form. (2008-DP 05/3 deals with recording these elements in a coded form). The three options are:
Option 1: Define field 336 (Content, media and carrier type).
Option 2: Define field 337 (Media and carrier type).
Option 3: Define field 337 (Media type) and field 338 (Carrier type)

The Committee decided to delay a decision on which option to choose until the full draft of RDA has been issued. A “$3” subfield (“Materials specified”), may also be added to the proposal.

**Proposal No. 2008-05/4: Enhancing field 502 (Dissertation note) of the MARC21 Bibliographic Format**


This paper proposes the addition of the following subfields to field 502:

- $b Degree type
- $c Name of granting institution
- $d Year degree granted
- $o Dissertation number
- $g Miscellaneous information

Content designation could be designated through a new second indicator, with values “basic” or “enhanced”, like field 505 (contents notes). All information could be put in subfield $a, as it is now, or in the newly defined subfields. An allowable variation would be to use $o “dissertation number,” but with all other information in subfield $a.

This proposal passed, with the following revisions: No indicators will be used for level of content designation, as the appearance of the additional subfields should make it clear whether the dissertation note is at the basic or at the enhanced level. (This decision contrasts with the use of basic and enhanced indicators in field 505; many on the Committee thought that these indicators should never have been defined). Also, subfield $o will be named “Dissertation identifier”, rather than “Dissertation number.”

**Discussion Paper No. 2008-DP05/1: Using RDA relators between names and resources with MARC 21 records**


This paper covers RDA relators expressing relationships between a resource and persons, families, or corporate bodies associated with it. (Relators which define relationships between different resources will be discussed in a later paper, when the full RDA draft is made available). Although changes to the MARC relator list do not need MARBI proposals, several questions were raised by the DP. Should RDA relators not already on the MARC relator list be added to it, or maintained as a separate list? If on separate lists, do we need to identify the source of the terms? Also, should we add $4 to the MARC 21 Authority Format in the 1XX fields? URIs might also be encoded in this subfield, to identify all terms from RDA’s role list.

There was no consensus on these questions at the ALA 2008 Annual Meeting.

**Discussion Paper No. 2008-DP05/2: New data elements in the MARC 21 authority format**


RDA covers recording various attributes and relationships for persons, families, corporate bodies, works, and expressions. These attributes and relationships are derived from the definitions given in Functional Requirements for Authority Data (FRAD). MARC 21 does not currently provide for some of these elements. This DP suggests adding the following:

**046 Special coded dates** [046 is used with the same definition as in the Bibliographic format]. It would include subfields for birth date, death date, period of activity (both start and end), date of establishment, and date of termination. Some of these subfields would be used for persons, some for corporate bodies, and some for both.

A new block of 62X fields:

- 621 Additional places
  “Additional places” would include such data as place of birth and death for a person, country associated with a person, place of residence of a person, place associated with a family or corporate body, location of conference, location of headquarters of a corporate body, and place of origin (for a work).

Other proposed 62X fields would include:

- 622 Address
- 623 Field of activity
- 624 Affiliation
625 Occupation
626 Gender
627 Additional information about the family
628 Associated language or 041 Language code

This DP may be brought back as a proposal, depending upon RDA's final draft.

Discussion Paper No. 2008-DP05/3: Treatment of controlled lists of terms and coded data in RDA and MARC 21
This complex DP discusses the correspondence of controlled lists of terms and coded data relating to content, media and carriers given in RDA and MARC 21. It is the counterpart of Proposal 2008-05/3, which is concerned with recording the same three types of data in textual form in a record.

Discussion Paper No. 2008-DP05/4: Items not requiring MARC 21 format changes for RDA [issued for reference]
Some highlights include:

2.1 Mode of issuance.
No value will be added to MARC 21 Leader/07 (Bibliographic level) for “Multipart”, which is considered an element of Mode of issuance in RDA. The combination of using the existing value “m” (Monograph) in Leader/07, along with Leader/19 (Multipart resource record level), values “a”, “b”, or “c”, should be sufficient.

2.2 Script
Field 546 $b “Information code or alphabet” already exists in MARC 21 bibliographic format, and may be used to give script information.

2.3 Production, Publication, Distribution
No new subfield will be added for Distribution information, currently given in field 260 $b of the MARC 21 bibliographic format.

2.4 Copyright Date
The current practice for recording copyright date will be continued. It may also be given in subfield $g (Copyright date) of the recently defined field 542 (Information relating to copyright status).

2.5 Numbering of serials
RDA element for serials numbering includes separate element subtypes for the designations of first and last issues or parts, and the first and last issue of new sequences. The MARC Advisory Committee had suggested using the recently defined field 363 (Normalized date and sequential designation) for serials numbering. Adding caption information would be necessary. The RDA MARC Working Group decided to record the RDA numbering of serials elements in field 362 subfield $a, with the proviso that this decision may need to be revisited in a few years. I think that using field 363 would have been ideal for machine manipulation of the data and display purposes.

2.6 RDA element labels encoded in MARC 21
Definition of a subfield $i (Display text) was considered for some bibliographic note fields, such as field 511 (Participant or performer note) and field 255 (Cartographic mathematical data). The RDA MARC Working Group eventually decided that no display constants should be required, as the RDA data will be meaningful without them.

2.7 Descriptive cataloging form
Records cataloged according to RDA conventions will use a new code in subfield $e of field 040 for RDA, rather than a new code for descriptive cataloging form or rules in MARC 21 bibliographic and authority 008 fields.

RDA/ISBD records will be identified by a combination of 040 $e rda and use of the pre-existing value ‘i” in 008/18.

Proposals and Discussion Papers relating to Series

MARC Proposal No. 2008-06: Adding information associated with the Series Added Entry fields (800-830)
http://www.loc.gov/marc/marbi/2008/2008-06.html

MARC Discussion Paper No. 2008-DP03: Definition of subfield $3 for Recording information associated with series added entry fields (800-830) in the MARC 21 Bibliographic Format
http://www.loc.gov/marc/marbi/2008/2008-dp03.html
MARC Proposal No. 2008-07: Making field 440 (Series Statement/Added Entry--Title) obsolete in the MARC 21 Bibliographic Format

MARC Discussion Paper No. 2008-DP02: making field 440 (Series Statement/Added Entry--Title) obsolete in the MARC 21 Bibliographic Format

At ALA Midwinter 2008, CONSER presented Discussion Paper No. 2008-DP02 on making MARC 21 Bibliographic field 440 obsolete for series. (Libraries following the CONSER standard record guidelines do not use 4xx fields, but only 8XX series fields for series added entry).

If a library wishes to transcribe a series, the DP allows use of a 490 field. First indicator value “1” of the 490 field could be changed from “Series traced differently” to “Series traced in 8XX fields,” or both indicators could be made obsolete. 8XX fields would be used for series added entries, just like in the CONSER standard record. At the meeting, some committee members were in favor of transcribing the series statement in a new MARC field 445, instead of 490, which would also be made obsolete. Field 445 would nicely parallel field 245, with both being used for transcription. (The idea of using a field 445 was not carried over to the subsequent proposal).

The DP also proposed two new subfields to the 8XX series fields for series ISSNs and multipart ISBNs. (Adding a new field to field 022 to give a series ISSN was discussed, but disallowed, because we were informed that use of the 022 for this purpose would not meet with ISSN Center approval).

The Committee requested that the DP be brought back as two separate proposals, one to make field 440 obsolete, and one to add subfields to the 8XX fields.

At the ALA Annual 2008 Meeting, both proposals were presented, and both passed. Proposal No. 2008-07 makes field 440 obsolete in the Bibliographic Format. Field 490 indicator “1” has now been re-defined as “Series traced in 8XX field.” Proposal No. 2008-06 defines a subfield $x (ISSN) in 8XX Series Added Entry fields. It also defines $3 in field 490 and the 8XX series fields for “Materials specified”. Subfield $3 will be useful when not all parts of a ongoing publication are in the same series. Angle brackets may be used around dates in subfield $3 to indicate that the exact dates of the series are not known.

Other Proposals and DPs

Proposal No. 2008-08: Definition of subfield Sz in field 017 of the MARC 21 Bibliographic and addition of the field to the MARC 21 Holdings formats
http://www.loc.gov/marc/marbi/2008/2008-08.html

The National Library of Spain is implementing a new integrated library system, and wishes to switch over to MARC 21 from its adapted version of the MARC21 format called IBERMARC. The national library and other Spanish libraries wish to continue their current practice of recording canceled/invalid legal deposit numbers. This paper proposes a new subfield Sz for field 017 (Copyright or legal deposit number) in the MARC 21 holdings format. This proposal was approved without discussion at the ALA Annual Conference.

Discussion Paper 2008-DP06: Coding deposit programs as methods of acquisitions in field 008/07 of the MARC 21 holdings format

The National Library of Spain and other Spanish libraries distinguish among “Legal deposit,” “Deposit,” and “Depository library” in the IBERMARC holdings format, and wish to continue to make these distinctions after they switch over to MARC 21. Items received through legal deposit are free and belong to the library which acquires them. Items received through deposit are resources which are loaned to the library in order to preserve them. Items received through a depository library program come from a non-commercial publisher, and don’t belong to the receiving library. Code “d” (Deposit) in field 008/07 of the MARC 21 holdings format identifies items received through deposit programs, but it doesn’t make a distinction between these three types. This code has been used differently by different libraries; therefore, it might be problematic to define new codes for “Legal deposit” and “Depository library”. Another possibility is to continue to use 008/07 code “d” for all three types, and then to make finer distinctions in Field 541 (Immediate source of acquisition note) “Sc”. A controlled vocabulary could be used.

The MARBI Committee decided that more analysis was needed; the Library of Congress and the National Library of Spain will work together to come up with a new proposal.
Proposal No. 2008-09: Definition of Videorecording format codes in field 007/04 of the MARC 21 Bibliographic format
Two newer digital formats, Blu-ray and HD DVD (High-Definition Digital Versatile Disc) can hold more data than standard DVDs, but require the use of different players. This paper proposes new codes for both. The MARBI Committee approved a new code “s” for Blu-ray, but decided that HD DVDs should remain coded in “other” (pre-existing code “z”).

Proposal No. 2008-10: Definition of a subfield for Other standard number in field 534 of the MARC 21 bibliographic format
Subfields $x (ISSN) and $z (ISBN) are already defined for field 534 (Original version note). The National Library of Finland has proposed a subfield for other standard numbers, such as the ISMN (International Standard Music Number), which might be useful to record in field 534. This proposal was approved, but with the name changed to: “Definition of a subfield for Other resource identifier in field 534 of the MARC 21 Bibliographic Format.”

MARC Discussion Paper No. 2008-DP01: Identifying headings that are appropriate as added entries, but are not used as bibliographic main entries
http://www.loc.gov/marc/marbi/2008/2008-dp01.html
Under current cataloguing rules, added entries are not allowed for buildings, parks, etc. in which exhibition, conference, and performances take place. Names of such entities may be established in the subject authority file, but lack corporate identity and so cannot be used as added entries. (Examples: Freedom Hall (Louisville, KY), and Apollo Theatre (New York, N.Y. : 125th Street)). Added non-topical entry might be useful for such entities, as well as for “tale” headings such as “Cinderella.”

This DP discusses three alternatives to identify these headings: Definition of code “c” in authority field 008/14, meaning “appropriate for added entry”; use of authority field 667, or definition of a new 7XX Added entry: Non-topical Venue of Event (756, 757, or 758 are available). While these options are not mutually exclusive, the Committee agreed that use of a code in authority field 008/14 would be best, in order to support machine processing. A new code will be proposed, rather than code “c”, since code “c” is currently obsolete (The MARBI Committee tries not to reuse obsolete values with a new meaning). No. 2008-DP01 will be brought back as a proposal.

Report of the AALL Representative to the American Library Association
Association for Library Collection and Technical Services
Cataloging and Classification Section
Subject Analysis Committee (SAC)
Midwinter Meeting, Philadelphia, January 2008
Annual Meeting, Anaheim, June 2008

Yael Mandelstam
Fordham Law School Library

The Subject Analysis Committee is charged with “studying problems and recommending improvements in patterns, methods, and tools (particularly classification and subject headings systems) for the subject analysis, organization, and retrieval of information resources, and providing liaison for those areas of interest between CCS and other ALA and non-ALA organizations that have an interest in and concern for these activities.”

The Committee meets at ALA Midwinter and ALA Annual on Sunday, 9:30 AM - 11:00 AM and Monday, 1:30 PM - 4:30 PM. Meetings are mainly devoted to reports from the various SAC liaisons and reports from the chairs of SAC and its subcommittees.

Following is a summary of SAC activities and highlights from the Library of Congress reports.

Joint SAC/PCC Task Force on Library of Congress Classification Training
Subcommittee on the Future of Subject Headings

The charge of the subcommittee is to “analyze the future of subject analysis using controlled vocabulary through the use of SWOT (Strength, Weaknesses, Opportunities, and Threats) analysis, taking into consideration both internal forces within the library community and external environment.”

Since the subcommittee broadened the scope of its charge from Library of Congress Subject Headings (LCSH) to controlled vocabularies in general, it reopened the discussion on its Listserv at http://lists.ala.org/wws/arc/headings. Though the discussion is now closed, the archived postings are worth reading. The subcommittee will submit its final report at ALA Midwinter 2009 and is planning a panel discussion at Annual 2009.

Subcommittee on Genre/Form Implementation

The subcommittee acts as a facilitator of two-way communication between the Library of Congress Cataloging and Support Office (CPSO) and the cataloging communities with interest in genre/form headings, including but not limited to the moving images, music and law communities.

In a recent open letter to the Library of Congress Acquisitions and Bibliographic Access Directorate, the subcommittee stated its support for the continued creation of authority records for genre/form headings. The subcommittee offered to partner with the Library of Congress in the Genre/Form Authority Record Project and voiced interest in the creation of a SACO Genre/Form Funnel.

The subcommittee plans to identify genre/form headings currently established as 150 authority records, develop a list of general genre/form terms that are used across disciplines (e.g. Periodicals), and explore the use of geographic subdivisions for genre/form headings.

Subcommittee on FAST (Faceted Application of Subject Terminology)

FAST—a subject vocabulary derived from LCSH—was developed by OCLC in cooperation with the Library of Congress. The subcommittee on FAST continued to refine and expand the FAST manual and explore issues related to FAST implementation.

As of July 20, 2008, the FAST authority file contained 1,668,161 terms for topics, forms, personal and corporate names, geographic names, events, periods, and uniform titles. The latest version of the FAST database and the FAST manual are available at http://fast.oclc.org.

Highlights from reports submitted by Janis Young (Midwinter) and Ana Cristán (Annual), Library of Congress Cataloging Policy and Support Office (CPSO)

The full LC at ALA report is available at http://www.loc.gov/ala.

LCSH: Pre- vs. Post-coordination. In response to a request from the Director of Acquisitions and Bibliographic Access (ABA) for a review of the pros and cons of pre- versus post-coordination of Library of Congress Subject Headings (LCSH), CPSO prepared a report, “Library of Congress Subject Headings: Pre- vs. Post-Coordination and Related Issues.” In addition to a review of the issue of pre- versus post-coordination, CPSO made recommendations to reduce the costs for and further automate the process of subject cataloging while retaining the benefits of the pre-coordinated strings of LCSH. The final report is available on the Library’s Cataloging and Acquisitions home page at http://www.loc.gov/catdir/cpso/pre_vs_post.html.

LCSH Subject Validation Records and Classification Web. In May 2007, the Cataloging Distribution Service (CDS) began distributing a series of subject authority records that were created solely for the purpose of allowing for machine validation of commonly used subject strings consisting of established headings combined with free-floating subdivisions. As of June 2008, over 29,000 of these so-called “validation records” have been distributed, and they are continuing to be distributed at an accelerated pace. The LC Subject Search screen in Class Web was recently restructured to allow users the option of excluding or including the validation records in their search results.

Genre/Form Authority Records. The Library of Congress is continuing its efforts to develop genre/form headings (MARC tag 155), and is currently active in two areas: moving images (films, television programs, and video recordings) and radio programs. The Cataloging Policy and Support Office has submitted a report to the Director for Acquisitions and Bibliographic Access, recommending that further projects, e.g., genre/form authority records for music and law headings, be investigated and undertaken.
**Subject Cataloging Manual: Subject Headings.** With the 2008 update, the Subject Cataloging Manual: Subject Headings is current through the end of February 2008. This is the final update to the 5th edition of the manual. In autumn 2008, a new edition of the manual will be published under the title Subject Headings Manual. The new edition will consolidate the previous updates and complement the Classification and Shelflisting Manual, published in May 2008.

**Classification and Shelflisting Manual.** In 1992, a classification manual consisting of individual instruction sheets on the application of Library of Congress Classification in specific cataloging situations was published under the title Subject Cataloging Manual: Classification. The first edition of a shelflisting manual was published in 1987 as Subject Cataloging Manual: Shellfistig, followed by a second edition in 1995. Because classification and shellfisting are such closely related processes, for this new 2008 edition the two manuals were combined into a single loose-leaf volume with the title Classification and Shelffisting Manual. The shelffisting portion of the manual in particular has been extensively revised and reorganized, and many of the instruction sheets have been assigned new numbers. The 2008 edition of the Classification and Shelffisting Manual is available from the Cataloging Distribution Service.

**LCSH and SKOS (Simple Knowledge Organization System).** LC is working with the Semantic Web Deployment Working Group of the World Wide Web Consortium to develop SKOS, which will support the use of classification systems and thesauri in the World Wide Web. Here is information from [http://lcsh.info](http://lcsh.info), the project’s site: “This is an experimental service that makes the Library of Congress Subject Headings available as inked-data using the SKOS vocabulary. The goal of lcsh.info is to encourage experimentation and use of LCSH on the web with the hopes of informing a similar effort at the Library of Congress to make a continually updated version available. More information about the Linked Data effort can be found on the W3C Wiki.”

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**New Catalogers Roundtable**

Reported by

Dan Blackaby

Western State University Law Library

The NCRT was very well attended this year, with over 25 participants. Topics of discussion ranged from a review of the cataloging workshop to the impact of RDA on law cataloging. Much time was devoted to how specific resources could be handled. Of particular interest was a proposal to create a new cataloger’s resource. Ideas were advanced on the best possible format, content, and method of editorial control. Also suggested was a possible proposal for a workshop at which public services librarians could acquaint catalogers with their viewpoints on resources, particularly on their formats and uses. Sean Chen (Duke University Law Library) volunteered to head up the roundtable for the next year.

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**Rare Book Cataloging Roundtable Report**

By Sabrina Sondhi

Diamond Law Library, Columbia University

The Rare Book Cataloging Roundtable (sponsored by TS-SIS) made its second official appearance at the Annual Meeting in Portland, Oregon. Despite being scheduled at noon on Tuesday, the Roundtable was well attended by a very interesting mix of catalogers and non-catalogers. Some of the attendees had a lot of experience in handling rare books. Others did not work with rare books professionally, but had a personal interest in them. Still others had recently been assigned responsibility for their libraries’ rare books, or had recently started rare books or archival projects and had specific questions to ask the group. Altogether it was a very collegial group and a lot of interesting information was shared.

Sarah Yates began the session by describing the new Rare Materials Descriptive Cataloging Task Group. This group will assist the Bibliographic Standards Committee (BSC) of ALA’s Rare Books and Manuscripts Section in the compilation of cataloging examples to complement Descriptive Cataloging of Rare Materials (Books) (DCRM(B)) and Descriptive Cataloging of Rare Materials (Serials) (DCRM(S)). These compilations will likely be similar in format to Examples to Accompany Descriptive Cataloging of Rare Books (2nd ed., 1999). The first round of submissions to the BSC will take place in December 2008 and the second round in June 2009. Anyone interested in joining this Task Group should contact Sarah Yates at yates006@umn.edu as soon as possible.

After a brief discussion of the merits of using DCRM(B) as compared to AACR2 when cataloging rare materials, and the potential impact of the forthcoming Resource Description and Access (RDA) on DCRM(B), we went around the table to allow attendees an opportunity to describe their interest in rare books and the organizational structure for rare book cataloging at their institutions. Some law libraries actively acquiring rare books, such as Yale and George Washington University, have...
experienced catalogers who dedicate most of their time to cataloging rare books. Other law libraries which are focusing on their existing collections, such as Mercer University and the University of South Carolina, depend upon their reference librarians to oversee their rare books collections and flag any cataloging issues. Almost universally, each library’s technical services department oversees cataloging of rare books, regardless of whether the institution has a public services position dedicated to its rare book collection. One exception is Louis Miranda, Chief Law Librarian at York University, who will be cataloging their rare books, partly due to his background and experience as a special collections librarian.

During introductions, the conversation intermittently turned to specific rare books or archival projects on which individuals were working. Elaine Bradshaw (University of Oklahoma) has a new archival project in which item level records will be entered in a homegrown digital management database. Ann Nez (University of Washington) raised some questions about cataloging variant copies of early territorial session laws, which had been found in her library’s collection. Susan Karpuk (Yale), Louis Miranda (York), and others recommended that each variant be retained and described in detail in bibliographic note fields. There was also general consensus that a paper facsimile of a session law volume (for use in the library’s reference section) could be made by combining portions of two variant volumes.

Do you have questions about cataloging rare books? Come join us at the Roundtable next summer in Washington D.C.! In the meantime, interested persons are invited to join the rare book cataloging listserv. Contact Sarah Yates at yates006@umn.edu for more information.

### OBS-SIS Cuadra STAR – CassidyCat4.1 User Group Roundtable Meeting

**Tuesday, July 15, 2008, Noon-1:30 pm**

Facilitator: Joni Cassidy, Cassidy Cataloguing, Rockaway, NJ.

Attendees: Marian Drey (U.S. Courts Library, 5th Circuit, Shreveport, LA) and David F. Smith (Cuadra Associates, New York, NY)

The meeting was called to order by Joni Cassidy at 12:10 pm on Tuesday, July 15, 2008 in the Oregon Convention Center, Room A-108.

Roundtable discussions began with introductions and a description of the Cuadra STAR application in the U.S. Courts Library and at Cassidy Cataloguing. The Courts Library has recently installed Cuadra’s Archives module and Cassidy Cataloguing uses Cuadra’s OPAC and cataloging software to provide a web-hosted solution to some of their customers. Both customers commented on their positive technical support experiences with Cuadra Associates.

David Smith of Cuadra Associates offered details regarding the company’s plans for upgrades to the various modules.

The meeting adjourned at 1:05 PM.

There was no discussion of repeating this particular Roundtable next year. Cuadra Associates announced on July 14 that they have joined the SydneyPLUS group of companies. A joint User Group Roundtable for SydneyPLUS and Cuadra STAR will most likely be appropriate.

Respectfully submitted by:
Joni Cassidy

### OCLC/RLIN Update and Roundtable

**Ming Lu**

Los Angeles County Law Library

The OCLC/RLIN update and roundtable sessions were held on July 15, 2008 at the AALL Annual Meeting in Portland. As co-chairs of the OBS-SIS OCLC/RLIN Committee, Keiko Okuhara and I coordinated both sessions. More than forty OCLC and former RLIN users attended.

Glenn Patton, Director of OCLC’s WorldCat Quality Management Division, presented a general update. Glenn began with a discussion of WorldCat Local, a discovery platform that can smoothly expand user searches from local to global. WorlCat Local is now available. Next, Glenn reviewed web harvester and digital archives, which are important parts of
OCLC’s digital collections services. Glenn also talked about how to create institution records and explained how OCLC’s batchloading service works. He brought attendees up to date on topics such as new WorldCat collection sets, collection analysis, resource sharing, controlling headings, OCLC’s new contract services pricing model, a next-generation cataloging pilot project, and more. Glenn answered a lot of questions raised in both the update and roundtable sessions. Most questions focused on WorldCat Local, digital archives, and post-OCLC/RLIN integration.

In the roundtable session, Phyllis Post, Head of Technical Services at Capital University Law Library (Columbus, Ohio), reported on the OCLC Users Council. She began by explaining how she became our representative. The AALL Executive Board approved a request by OBS-SIS that AALL appoint a representative to attend OCLC Members Council meetings. Phyllis was appointed, and she attended the Members Council meetings held at OCLC’s headquarters in nearby Dublin, Ohio in October 2007 and January 2008.

Phyllis noted that the Members Council has been very welcoming to outsiders. Even though she can only observe and can’t vote, she can talk with council members individually to ask about product development and discuss issues. She found the breakout discussions on metadata and resource sharing particularly informative, as well as the updates on finances, services, and products, including the questions council members posed.

More information on OCLC Members Council may be found at: http://www.oclc.org/memberscouncil.

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**OBS-SIS Special Committee on Record Sharing**

**2008 Committee Meeting Report**

Reported by Pat Callahan

The OBS-SIS Special Committee on Record Sharing met at the AALL conference in Portland on Monday, July 14 from 12:00-1:15.

Pat Callahan, committee chair, welcomed the attendees and provided some background information on the committee and its work.

At the 2007 committee meeting in New Orleans, the committee had decided, based on the results of surveys distributed to librarians and vendors, that there was enough interest in the issue of record sharing (or sometimes nabbing) to merit development of a set of ethical guidelines on record sharing. As a result of the decisions made at that meeting, three committee members, Joni Cassidy, Katrina Piechnik and Pat Callahan wrote an outline that was reviewed by the other committee members and the OBS Board. Thanks to input from the committee members, the OBS Board and some other interested parties, a draft statement on the ethics of record sharing was sent to the OBS Board just before the conference. It was distributed at the meeting.

Those at the meeting reviewed the draft statement and discussed issues such as the cost of cataloging, copyright and intellectual property as they relate to bibliographic records and what precautionary measures some libraries are already taking to prevent wholesale harvesting of their records. All agreed that ethical sharing, as defined in the draft statement, is fine, but unethical harvesting, particularly of vendor-created records, is a problem that needs to be addressed.

There was also discussion of Tim Spalding’s announcement on his LibraryThing Blog of thirteen law libraries that can be used as “data sources.” http://www.librarything.com/blog/labels/law%20libraries.php (Spalding, Tim. LawLibraryThing. LibraryThing Blog, 10, January 2008. Web. 20 August 2008).

There is a great deal of interest in distributing the ethics of record sharing statement to various organizations and vendors during the coming months. The OBS–SIS Board will decide who within AALL will be contacted before that is done.

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**OBS-SIS Special Committee on Record Sharing**

**2008 Annual Report**

Reported by Pat Callahan

At the AALL conference in New Orleans on Sunday, July 15, 2007, the committee’s meeting agenda included a discussion of the results of the record sharing survey that had been sent to members of the OBS, TS and PLL SISs. Based on the survey results and our discussion at the meeting we decided to move forward with a set of ethical guidelines that would be shared
with the OBS Executive Board, the AALL Executive Board, members of the SISs mentioned above, OCLC and national and international organizations with an interest in record sharing, whether that interest is for profit or not.

Three committee members volunteered to write an outline that would be turned into a set of ethical guidelines. The committee members who worked on the outline were Joni Cassidy, Katrina Piechnik and Pat Callahan. The outline was sent to the committee for review and then to the OBS Board. We also received some very valuable input from other interested parties and have now turned the outline into a set of guidelines. The final draft will be sent to the OBS Board soon.

The committee is scheduled to meet at the AALL conference in Portland on Monday, July 14 from 12-1:15.

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**OBS-SIS/TS-SIS Joint Research Grant Committee Meeting**

**Minutes, July 12, 2008 in Portland, Oregon**

Present: Ruth Funabiki (Chair), Kathy Faust, Richard Amelung, Andrea Rabbia.

Ruth Funabiki called the meeting to order at 5:15 p.m. She announced and welcomed new committee members Pam Deemer and Barbara Henigman. Copies of the committee’s annual report were distributed and reviewed.

Our principal business item was to consider ways to promote grant opportunities, now that funding is available. Several options seem promising: 1) Ask the new TSLL research & publication columnist to promote the grants, 2) Promote the grants on the OBS-SIS Facebook page, 3) Announce the grants on LAW-LIB, instead of limiting the announcement to the OBS & TS listservs, 4) Make a grants brochure/handout to distribute during CONELL, 5) Promote the grants in chapter newsletters & AALL conference newspapers.

The meeting adjourned at 5:40 p.m.

Respectfully submitted by
Ruth Funabiki
University of Idaho Law Library

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**OBS-SIS/TS-SIS Research Roundtable**

**Tue. July 15, 2008, 7:00 am**

Present: Ruth Funabiki, University of Idaho (chair); Hollie White, University of North Carolina at Chapel Hill; Alan Keely, Wake Forest University; Nancy Babb, University of Buffalo; Rob Richards, Drexel University (reporter).

Ruth Funabiki, Chair of the Joint OBS-SIS/TS-SIS Research Committee (Joint Committee) and Head of Technical Services at the University of Idaho, chaired this roundtable discussion. Hollie White, a Ph. D. student at the University of North Carolina at Chapel Hill School of Information and Library Science, and a research assistant at the School’s Metadata Research Center, described her work on Bot 2.0, a National Science Foundation (NSF)-funded project to build and study a botany information system that incorporates an open-source hyperlink system and Web 2.0 software.† White also reported on the Center’s project to manage metadata for the “NC Health Info” health information Website.‡ Identifying NSF and the Institute of Museum and Library Services (IMLS) as key funding sources for library science research, White explained the NSF and IMLS grant-application processes. White observed that the IMLS grant application process is time-consuming but worthwhile, and that NSF has recently added a library and information science scholar, Bryan Heidorn of the University of Illinois at Urbana-Champaign, to its grants review team. Funabiki noted that the Joint Committee has a $1,000 research grant available.

Alan Keely, immediate past-TS-SIS Chair and Associate Director for Collection Services and Systems at Wake Forest, thanked Funabiki for chairing the Joint Committee and encouraged OBS-SIS and TS-SIS members to engage in research and to apply for the Joint Committee grant. He noted that technical services librarians often have difficulty finding time to

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1 See [http://ils.unc.edu/mrc/bot-20/](http://ils.unc.edu/mrc/bot-20/).
engage in research. He encouraged technical services librarians to make extra time to conduct research, and to write about issues that arise in the course of our work, such as those involving the nuts and bolts of integrated library systems.

Nancy Babb, Cataloging Librarian and Web Manager at the University of Buffalo, discussed her recently completed tenure process, which resulted in her obtaining tenure and a promotion to associate professor. Babb’s published work deals with the history of cataloging and the ways in which cataloging reflects social and cultural influences, such as the concept of authorship. Funabiki and Babb observed that law librarians increasingly seem to pursue multidisciplinary work. Babb agreed with Keely about the difficulty technical services librarians have in making time to engage in research, because we often have to meet production quotas in our daily work. Babb and Funabiki urged technical services librarians to publish newsletter articles, because they can be written and published quickly and can provide ideas of use to researchers and practitioners. Keely noted that TSLL is currently seeking columnists for its “Description & Entry,” “Acquisitions,” and “Collection Development” columns, and encouraged members to apply for those positions. Funabiki encouraged technical services librarians to be disciplined and persistent about writing. Babb recommended collaborating with others on writing projects.

Funabiki shared her more than thirty years in law librarianship with the group, including obtaining tenure and a master’s degree in communications from Washington State University. Funabiki is currently engaged in collaborative work with Erica Weintraub Austin and Bruce E. Pinkleton, co-writing scholarly articles and conference papers on the topic of media literacy in health communications. One of these papers was recently published in the leading journal in the field of communications studies, *Communication Research*.

Funabiki also uses her scholarly training in her teaching of a course in media law at Washington State University.

Rob Richards (Head of Technical Services at Drexel) described three research topics he would like to explore in the next few years: an empirical study to determine what constitutes “essential metadata” for users of legal information, a comparative study of the relationship of doctrine to information in law and other disciplines, and a historical study of how legal treatises gain and lose their status as primary legal authorities.

To apply to write a column for TSLL, contact the editor, Brian Striman, bstriman@unl.edu, (402) 472-8286. To apply for the Joint Committee Research Grant, visit http://www.aallnet.org/sis/obssis/research/funding.htm, or contact Ruth Funabiki, funabiki@uidaho.edu, (208) 885-2158.

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**Workshop Report**

**Swim, Don’t Sink: Immerse Yourself in Law Cataloging**

Reported by

Sean Chen

Duke University School of Law Library

There was a lot of pent-up demand for the expertise that was available at this two-day pre-conference workshop that covered nearly the entire landscape of legal materials cataloging. Topics covered included general descriptive cataloging, serials cataloging, integrating resources cataloging, Library of Congress Subject Headings (LCSH), and Library of Congress classification (LCC). The workshop presupposed a working knowledge of cataloging, including familiarity with the *Anglo-American Cataloguing Rules, 2nd ed.*, (AACR2), *Library of Congress Rule Interpretations* (LCRIs), and general cataloging community practices. The aim of the workshop was to give catalogers who were unfamiliar with legal materials a deeper background and understanding of the intricacies of law cataloging, and to provide a review to others who may already have had that background.

Melody Lembke, Director of Collection Management Services at Los Angeles County Law Library, began the first day with a morning session covering descriptive cataloging. Ms. Lembke co-authored *Cataloging Legal Literature: A Manual on AACR2 and Library of Congress Subject Headings for Legal Materials, with Illustrations* (3rd ed., 1997, AALL publication series no. 22). Her session covered the nature of legal publications, and emphasized identifying what a publication is and then applying the appropriate descriptive rules.

She explained that understanding what a legal resource is requires knowledge of legal publishing, legal publications, and legal systems. Catalogers must understand not just physical formats, such as print and electronic, but also the place of those formats within the world of legal publishing. Specific legal materials that fall under special AACR2 rules include court decisions, statutes, constitutions, and administration regulations and decisions.
After the cataloger has identified what something is, Ms. Lembke highlighted the various decision trees used to determine appropriate access points. She took participants through example records of all the various materials covered in chapters 21.31021.36 of AACR2. While going through each example, she concentrated on areas where people have difficulties. She emphasized the importance of working to minimize the need for future bibliographic file maintenance. She stresses the importance of understanding the needs of our own particular libraries and users, and making descriptive cataloging decisions designed to serve them.

Jean Pajerek, Head of Technical Services and Information Management at Cornell Law Library, talked about using LCSH during the second morning session of the first day. Ms. Pajerek’s background in subject vocabularies includes representing AALL on the American Library Association’s Subject Analysis Committee and serving as chair of the Technical Services Special Interest Section’s Cataloging and Classification Committee. She focused most of her presentation on subject heading syntax, legal subject headings, and the process of subject analysis.

Ms. Pajerek discussed the standard order of subdivisions: Topic—Place—Time—Form. Then she delved into subject headings used for legal topics. These can be broken down into classes: (a) inherently legal subject headings (Contracts, Torts, Property), (b) phrase headings (Labor law and legislation, Environmental law), (c) terms qualified by the adjective “legal” (Legal composition, Legal etiquette), (d) headings with parenthetical qualifiers (Discovery (Law)), and (e) subdivisions used to show legal aspects of non-legal topics (Soccer—Law and legislation—United States). She also covered pattern headings for legal topics and special legal materials.

The rest of the LCSH portion of the workshop was spent discussing the subject analysis process and the method of synthesizing appropriate subject headings based upon the guidance provided by LC’s Subject Cataloging Manual: Subject Headings. Exercises highlighted some of the thornier cases and problem areas that many law catalogers encounter when applying LCSH, and appeared to be useful for nearly everyone in the workshop.

During the last session of that epic first day, Kathleen Padgen, serials cataloger for the Law Library of Congress, covered legal serials. She noted that she has been working with legal serials for over thirty years, and she often sees the same problems over and over again. Ms. Padgen discussed the complex nature of serials and how to cope with their constant changes. She offered specific examples of many types of legal serials, and concluded with a brief look at electronic serials.

Some of the challenges that serials present include knowing the differences between monographs and serials, and coping with the ever-changing nature of the materials and the rules for cataloging them. Knowing what it is that you are cataloging was an important point of this session. Complexity was illustrated through analysis of multiple records representing intricate title histories. One area of difficulty for new serials catalogers is identifying title changes and being able to distinguish between a major title change and a minor one.

Marie Whited, Catalog Liaison between the Law Library of congress and the law team in the Library of congress Library Services Unit, began the second day of the workshop with a discussion on the use of LCC, and more specifically the K schedules (Law), especially KF (American law). She talked about the historical background behind the development of the K schedules, explained the logic that organizes the schedules, and led exercises in applying what she’d taught during the session.

One important area on which Ms. Whited concentrated was the jurisdictional (geographic) and then form (what something is) organization of the K schedules. This organization reflects the way that the material is used and housed at the Law Library of Congress, while at the same time attempting to reflect a logical organization of the topic of law. In a recurring theme throughout the workshop, the identification of what a particular legal resource is was highlighted. This became important as Ms. Whited led the workshop through a series of exercises in applying LCC to actual materials, beginning with steps such as: (a) Is this thing a law book? (b) What is the jurisdiction, if any? (c) Is it more than one jurisdiction? (d) How specific is the topic? (e) What is the material’s form? (f) What are the legal subjects covered? And (g) What branch of law is applied, or are there more than one?

In the second half of the morning session on that second day, Melody Lembke reprised her descriptive cataloging session in order to review more advanced topics that came out of later discussions. She continued a discussion about the sorts of cataloging decisions that are made in order to serve broader collection-level policies. For instance, catalogers might wish to consider when the number of records associated with a particular serial becomes too complex, and latest entry might be more useful than successive entry from the user’s perspective.

That afternoon, Richard Amelung discussed integrating resources in all their gory detail. Mr. Amelung is Associate Director at St. Louis University Law Library. He has extensive experience with cooperative cataloging, and recently served on LC’s
Working Group on the Future of Bibliographic Control. His presentation concentrated on what integrating resources are and then the details that distinguish a record for an integrating resource from other types of records.

He started by referring to a presentation made for the Online Audiovisual Catalogers group. However, rather than following that very good tutorial, he concentrated instead on the print materials that make legal integrating resources different from other types of resources, highlighting the interfiling nature of loose-leaf publications. From there, he moved on to the development of rules for integrating resources and the revision of AACR2’s chapter 12.

Concentrating on the concept of what makes an iteration, and its relationship to what is being described, Mr. Amelung walked participants through the details of how a record for an integrating resource is created. He illustrated the hybrid nature of these resources in an entertaining manner. When confronted with a difficult case, he suggested asking oneself, “How does this update?” and using the answer to decide which rules to apply.

Lastly, there was a discussion session covering “The future of law cataloging.” Most of the discussion in this portion of the workshop concentrated on the final report and recommendations of the LC Working Group on the Future of Bibliographic Control. There was a bit said about the economics of the cataloging enterprise and what constitutes a sustainable information supply chain. Another point of discussion was Resource Description and Access (RDA), the revised version of AACR2, and the impact it will have on the cataloging of legal materials, with many agreeing that it’s just too early to tell how the introduction of new rules will actually play out.

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**Workshop Report**

**My First AALL Annual Meeting**

This year was my first AALL Annual Conference and I had the opportunity to attend “Swim, Don’t Sink: Immerse Yourself in Law Cataloging.” This was a two-day preconference workshop taught by five top-notch catalogers of legal literature. The course was intended primarily for new law catalogers. One of the challenges in cataloging the law is the diversity of materials that a law cataloger must know how to describe. As Melody Lembke emphasized in her session on descriptive cataloging, law catalogers must know what they are cataloging (is the work primary or secondary) and also how the materials are used by researchers.

Determining whether the item in hand should be cataloged as a monograph, serial, or integrating resource (e.g. updating loose-leaf publication) can also be a challenge to new law catalogers. Two separate sessions covered continuing resources. Kathleen Padgen taught serials and Richard Amelung integrating resources. Padgen’s discussion of session laws was of particular interest to me because I am currently cataloging my library’s collection of session laws. As serial publications, session laws often experience many title changes. The Library of Congress enters session laws under the earliest title, and treats any later title changes as minor (LCRI 21.2C). This is an exception to current serials cataloging practice, which requires a new or successive entry for each significant title change. In his abbreviated version of the SCCTP workshop on the topic, Richard Amelung did an excellent job distilling the cataloging of integrating resources down to the bare essentials. His emphasis was on updating websites that are analogous to updating loose-leaf publications.

Jean Pajerek and Marie Whited taught sessions on subject cataloging and classification respectively. In her session on subject cataloging, Jean Pajerek discussed “inherently legal” subject headings. Inherently legal subject headings are topical subjects that are so strongly associated with the law that they do not need the further subdivision “law and legislation.” Examples of inherently legal subject headings include “Civil rights,” “Custody of children” and “Real property.” On the topic of classification, Marie Whited gave a brief outline of the KF schedule (Law of the United States). She warned us about the pitfalls of misclassification. To avoid the misclassification of materials, the cataloger must always be aware of the hierarchical arrangement of topics in the schedule. For example, works on law and legislation affecting labor unions have two possible classes in the KF schedules: KF3409 (Labor law—Management-labor relations—Labor unions) and KF5365 (Federal civil service—Conditions and restrictions of employment—Employment relations—Labor unions). The order of the latter indicates that KF5365 is to be used for labor unions of federal government officials and employees, and the former for labor unions of all other industries and occupations.

Overall, this program was a fine introduction to the topic of legal cataloging. However, if offered in the future, I would not recommend it to anyone who has not had at least one year of cataloging experience, or to anyone not familiar with cataloging standards (AACR2R, MARC21, LCSH, LCC). I would also suggest reading Lembke’s and Lawrence’s excellent manual, *Cataloging Legal Literature*, 3rd ed., prior to taking the workshop.
About 32 law librarians attended this well organized workshop. Most of us came from academic law libraries but a few were from court and firm libraries. The workshop was divided into four sections covering (1) management issues, (2) arrangement and description, (3) use of archival materials in digital projects and privacy concerns, and (4) finding aid mark-up. The speakers are knowledgeable experts in the field.

MIKE WIDENER, Rare Book Librarian, Yale Law School, was the first speaker. He gave a general introduction to the management of archival materials. According to the Society of American Archivists (SAA), archives are the related records systematically maintained (normally after they have fulfilled the purpose for which they were created) because they contain information of enduring value. Archivists are advised to keep records of the same origin together; to keep records in the order and sequence established by the creator, unless there was no order at all; and to appraise, arrange, and describe groups of records before creating a finding aid.

The SAA website (http://www.archivists.org) contains valuable resources, SAA publications, and the “Code of Ethics for Archivists.” The tenets of the code are to cooperate with other archivists, to exercise professional judgment, not to profit from privileged access, to preserve the integrity of records, to promote open access, to protect privacy rights of donors, to protect all documentary materials, and to obey the law.

For institutional archives, it is advisable to obtain the authority to administer records. Establish partnerships with other institutions, e.g. the university archive or the local historical society. We might ask why the law school needs an archive while the university library already has one. The answer is to preserve the archives not collected by the university library. In law schools, student life is often not well documented while faculty life is sometimes over-documented. For faculty archives, be selective and be careful to separate personal life records from institutional records. To document student life, librarians need to establish a good rapport with student organizations, solicit contributions, and read their email and blogs. For a law school institutional archive, collect aggressively, get duplicate copies, and keep unbound issues of law reviews for exhibits. Do NOT forget law library publications.

When appraising an archive, evaluate its evidential value, informational value, and artificial value. Both the institutional politics and the cost of retention are important. How long do we keep the material? How long do we keep the material from public access? Are there restrictions on access? Who owns the copyright? How much does it cost to organize the material? When acquiring materials from donors, document preservation issues, and watch for pests in the donor’s house, e.g. silverfish, mold, etc., (bring your own box if possible). Ask if the donor will help pay for processing costs.

BARBARA A. HECK, Legal Archivist at Yale University Manuscripts and Archives, spoke on the arrangement and description of archival collections. Archival collections usually include PAPERS accumulated naturally by a person, family, or corporate body, or RECORDS representing official papers of a group or organization, or COLLECTIONS grouped together by artificial criteria. While there is no national standard for processing archives, by shadowing a colleague, one can develop a local processing manual to provide structure, procedures, and forms to ensure consistency.

Accessioning includes physically moving the collection to the library, verifying the legal rights involved, managing the physical move, and intellectually listing the contents. Processing involves appraisal, preservation/conservation, arrangement, and description. Researching the creator and careful examination of the contents are the first steps in appraising the collection. When preparing a processing proposal, keep in mind the level of processing needed and the human and material resources required. Not every archival collection requires the most detailed level of arrangement. Conservation is to repair past damage, e.g. removing paper clips, rubber bands, staples, etc. and preservation is to minimize future deterioration, e.g. maintaining a constant temperature of 65°F and relative humidity of 35%. Arrangement is the process of organizing materials with respect to their provenance and original order, to protect their context and to achieve physical or intellectual control over the materials. Weeding is necessary to keep the most important items and shred the discarded items. In general, there is no need to inform the donor if an item is discarded. Photocopying can retain content, and digitization is the best way to preserve newspaper items. Use folders and boxes to store items. A color system is used effectively at Yale to identify processing needs. Description is the process of analyzing, organizing, and recording details about the formal elements of a collection. A finding aid needs the following elements: title page, acquisition information, restrictions information, statement of extent, biographical/historical summary, scope and content note, and a detailed description. Describing Archives: A Content Standard (DACS) approved by SAA is the current standard for creating access tools for all forms of archival materials to assist users in
discovering desired records. Encoded Archival Description (EAD) is the standard used to “mark up” finding aids that reflect the hierarchical nature of archival collections. EAD allows users to take advantage of electronic searching capabilities.

BILL SLEEMAN, Assistant Director for Technical Services, Thurgood Marshall Law Library, the University of Maryland, gave an overview of the use of archival materials in digital projects. Digital projects can be done in-house, out-sourced, and in cooperation with other organizations like GPO. A digital archive allows a library to promote its historical materials without using the original sources. Access methods vary by institution. It is best to begin with what you know and what works best in your environment and build on it. Before starting a project, know why you are doing the project and whom you will serve, and convince the parent institution of the value of the material. Shamelessly promoting your project is very important.

The first step is to clarify the copyright issue with the donor. At the University of Maryland, the donor has to sign a “deed of gift.” Libraries or archives intending to collect legal materials must be familiar with the issues of attorney-client privilege and any intellectual property rights (IP) complications. Do not share any document before knowing its access right. It is important to seek advice from university counsel. A user of the University of Maryland Law Library special collections has to sign a use agreement. Document your process and prepare a local processing procedure.

LORI LINDBERG, Lecturer in Archival Studies at San Jose State University School of Library and Information Science, was the afternoon speaker. She gave an overview of Encoded Archival Description (EAD), the finding aid mark-up. Again, she reminded us that, before creating a finding aid, the archive must be fully processed. Archival inventories were formerly called “box lists,” a listing of containers and their contents. Today’s online finding aids require some additional descriptive metadata. Formerly implicit rules have been made explicit to facilitate searching and to maintain consistency in practice. DACS is the content standard for describing archives. It is based heavily on the International Standard for Archival Description – General (ISAD(G)), which specifies that archival finding aids are hierarchical and multi-level in their structure. To produce electronic versions of finding aids, Encoding Archival Description (EAD) is used, because MARC-AMC is not sufficient. EAD is a Standard General Markup Language (SGML). It is a descriptive markup of an inventory. Its hierarchical representation allows for specific searching and retrieval. EAD Version 2002, issued in June 2003, is currently in use. EAD is an open source system compatible with MARC and is managed by the Library of Congress. At the SAA website, one can find many useful tools related to EAD.

Although I am not sure that I can code a finding aid according to EAD by myself, I certainly have the general idea of how it works and what tools to acquire. After the workshop, I feel much more confident about how to work with archival collections: accessioning, appraisal, arrangement, and description. Useful bibliographies were prepared by each speaker. A “Certificate of Participation” was issued to all attendees at the conclusion of this workshop.

CONELL Report

I was very fortunate to receive the Marla Schwartz Grant and a TS-SIS grant to attend CONELL and the AALL Annual Meeting in Portland. I have been the Head of Technical Services at Golden Gate University Law Library for a year, and I am new to management and law libraries. I was nervous and excited to experience all that the Annual Meeting had to offer someone in my position.

CONELL began on Saturday morning with a nice breakfast and an introduction to the members of the Mentoring Committee. Ann Fessenden, the president of AALL, told the audience how she was a participant in the first CONELL conference that took place in 1978. She then introduced the Executive Board and the past presidents of AALL who were attending the conference. She pointed out that six of the past presidents were also graduates of the CONELL class of 1978! After the introductions, conference participants were given the chance to break out into small groups and meet with members of the Executive Board, to ask questions and to get to know one another better. I was lucky enough to have two experienced librarians leading my small group: past president Sally Holterhoff, and Board member Jean Wegner. The small group session was a great experience. Both Sally and Jean gave advice on how to get involved, and told us their stories on how they became active members of AALL.

The session continued with tips from various speakers on how to make the most of our first conference. One comment that almost every speaker made was how important it was for us to get involved by volunteering for committees, proposing a program, or contributing to publications, because AALL was guided by its members. Volunteering not only helps the Association but it helps us develop professionally as well. At the end of the morning session, the CONELL attendees broke
On a clear, slightly humid afternoon in mid-July, I found myself among dozens of other new law librarians peering through tour bus windows driving alongside the Columbia River as it wound its way through the city of Portland, Oregon. Having just completed morning sessions at the Conference of Newer Law Librarians (CONELL), we were on our way to hike the majestic Multnomah Falls, then tour fish hatcheries below the Columbia River gorge to watch baby salmon practice their river running skills.

It was an excellent way to decompress after attending presentations, group discussions, and activities all morning. As I settled into my seat on the bus, I felt like I was among friends. By then we had all had the opportunity to introduce ourselves, tell our stories and eat a meal together, sharing information about our careers, interests, and personal lives. Even before the start of the first morning session, there were people I had met at the Dutch Treat Dinner the night before that I could wave and say hello to when I entered a room. This gave me the sense that I was a welcome guest even before I was officially welcomed by the opening speaker.

I have worked in academic libraries for many years, and conferences were always part of the repertoire. I already knew what to expect from the registration process, exhibit hall, and speaker sessions. But I have never attended a conference, or been involved with an organization, that takes such good care of its new members. As an attendee of CONELL, I felt like a VIP.

CONELL provided me with the opportunity to make many professional connections and gave me the confidence I needed to maneuver throughout the Annual Meeting. Over the next few days, I attended several programs where I was able to acquire useful information to take back with me. In one session, I learned about other libraries’ firsthand experiences with the newest discovery platforms, such as Encore and WorldCat Local. I also sat in on a program that discussed getting electronic titles into the OPAC and was able to compare the methods between our library and the University of Oregon.

During the TS-SIS business meeting, the Renee D. Chapman Award winner, Joseph Thomas really struck a chord with me when he spoke about comparing technical services to the grunts in a football team. We work behind the scenes with little glory while the reference librarians collect the Heisman trophies—but it is technical services that really helps make a winning team. It was inspiring for me to be surrounded by like-minded people who were as passionate about cataloging and the intricacies of technical services work as I was. I also got to match faces to names I have seen on AUTOCAT for years! The Annual Meeting provided me with a chance to listen to some of the biggest names in the cataloging field; I must admit I was a little star struck when Lois Mai Chan spoke on the future of subject access.

I also attended a meeting of the Descriptive Cataloging Advisory Policy Working Group. This was an exciting meeting. I was able to listen to law catalogers brainstorming on how to prepare for the coming of RDA, and plan programs for next year’s meeting. It illustrated to me how the members of TS-SIS create the content of the Annual Meeting, whether it’s educational programs, workshops, roundtables, or committee meetings. I left Portland having a great experience and an expanded knowledge of my profession. I am certain that AALL will help me grow professionally with its thoughtful programming and continuing education opportunities. I am equally confident that I will get more involved in the coming year, and become a part of this vibrant, collaborative, volunteer-fueled Association.
private practice, and that many were just starting to contemplate an MLS. As people described the process of transitioning from the legal profession to librarianship, particularly those going from law firms to academic settings, I realized that they were describing not just a professional transition, but a personal process of metamorphosis, a journey from the “dark side” into the light as described somewhat tongue-in-cheek by one of the group members. Being a law firm librarian herself, Ms. Henderson offered her sympathies to those who had horror stories to tell, or who were struggling with the decision to go back to school after already putting in so much time and effort in the pursuit of a JD. The effect of these discussions was cathartic and people seemed to feel more connected after sharing their stories in this safe and welcoming environment.

After group sessions, half of us were whisked away to the CONELL Marketplace, the other half to “hyper-networking.” Time was tight, but the organizers did an amazing job of keeping us focused and on schedule.

The CONELL Marketplace seemed like a kind of primer for the exhibit hall. It provided a rare opportunity to meet leaders from the various Special Interest Sections and to become informed about opportunities for committee and SIS membership. If any of us were feeling tired or bored at this time, hyper-networking brought things back to life.

Four long rows of chairs, arranged face to face, were set up in one of the rooms for this exercise. Each of us was instructed to sit with a partner for exactly three minutes and talk about whatever came to mind. This three-minute time limit was strictly enforced! After three minutes passed, one row shifted to the right and a new conversation began. This format gave everyone a chance to talk with at least ten people during the session.

The most interesting part of this for me was to discover that I had something in common with almost every person I talked to. Some commonalities were quite striking. For example, I talked with one person who knew about this tiny town in Missouri that almost nobody has heard of, and we discovered that we actually had a mutual friend who was from there. How we were able to make this discovery in three minutes, I will never know, but it made me realize that I could find a connection with anyone, as long as I was willing to take just a few minutes to talk to them face to face.

All of this activity left me feeling a bit drained and looking forward to lunch. However, I had a new sense of confidence and found myself looking forward to the days ahead. Returning from the tour that afternoon, I was both exhausted and exhilarated by my experiences. Just before reaching the Portland city limits, our tour guide Jane pointed out a large, hat-shaped rock nestled on the banks on the north side of the Columbia River. Named Beacon Rock, it is the site of one of Lewis and Clark’s final encampments before reaching the Pacific Ocean. I felt like I had also been on a journey of discovery that day and felt gratified by what I had accomplished. CONELL inspired a sense of pride in my choice to become a law librarian and provided the perfect jump-start to the conference and a new career. I want to thank AALL for supporting the program, and the organizers for working so hard to put it all together.

Program Report

Encore, Enterprise, Primo and WorldCat Local: Explore the Evolving Discovery Tools for Your Catalog

This session was a great way to get a taste of four of the major “discovery” products in a vendor-neutral setting and get a peek of “things to come” (or more accurately, “things that are already here”!) in library interface development. An excellent comparison of the features of all four platforms was compiled by the moderator, Keiko Okuhara of the University of Hawaii, and is available from the AALL handouts page at http://programmaterials.aallnet.org.

The presenters were:
- Richard M. Jost, University of Washington, Gallagher Law Library
- Mary Jane Kelsey, Yale Law School, Lillian Goldman Library
- Julie Loder, Vanderbilt University
- Debra Moore, Cerritos College

Encore
Mary Jane Kelsey, from Yale University, spoke first about her experiences with Encore, Innovative Interfaces’ (III) entry into the faceted browser market. They were development partners for Encore, and so were involved with its design from the beginning of the project.

Yale’s goals for implementing Encore included: improving the user experience, increasing their return on their investment in the ILS and cataloging, maintaining a credible web presence, as well as bridging the gap between the law and Yale’s main
university OPAC, currently on Voyager. As a current III customer, setup was pretty much plug-and-play, though increasing amounts of customization are available. Encore will also work with non-III systems, but the data is not displayed in real time.

Encore displays a Google-like single search box; a link to perform an index search is present on subsequent pages after the main search page. Results are relevancy-ranked, with journal titles and electronic resources “pushed” to the top of the list; the latter are Yale’s customizations to the ranking algorithm. Book jackets are shown at both the results and individual record level. Version 2.0 of Encore also features images from Yahoo “Safe Search” – though Mary Jane found some of those images not so “safe!” A built-in spell-check validates against the database to prevent dead-ends, although this sometimes gives odd results. For example, a search on “voter fraud” responds “do you mean violin fraud?”). She finds the subject facets very useful—the ability to refine by tag includes a tag cloud displaying relative font sizes.

EPS
Debra Moore of Cerritos College presented their experiences with SirsiDynix’s Enterprise Portal Solution (EPS) interface. They had not intended originally to implement a discovery platform, but they needed to migrate systems anyway and found funds available to make the switch, so they went ahead with EPS as their new interface for the new system.

EPS is intended to be a total portal to the library, not just to its resources. It is built on a proprietary software system that allows the library to create content modules called “rooms.” The library can customize the design of each “room” within limited parameters and can select which resources appear in each room. For example, you could have a “psychology room” with links to your local or other OPACs, journal databases, web searches, etc.

Her favorite things about the system are the links to reviews, book jackets, and RSS feeds, and how the built-in federated search results display. However, it is necessary to purchase a third-party product, such as Serial Solutions’ 360 Search, to implement federated search. Her not-so-favorite things are the lack of authority control. For example a search on “movies” instead of “motion pictures” will retrieve nothing. Other aspects that are a concern are the clunkiness of the “room builder” software, the lack of faceted search results (though this is under development by SirsiDynix as a separate product), and the slow speed of the system.

Primo
Julie Loder of Vanderbilt University presented an overview of ExLibris’ Primo. As Yale was with III, Vanderbilt was a development partner with ExLibris for Primo, and did a soft rollout of their “DiscoverLibrary” in Spring 2008. Their underlying OPAC is actually Unicorn, with Primo sitting “on top.” At present, the use of the native catalog is still required for “My Account” functions and requesting.

Primo works by building “pipes” to various collections (local OPAC, digital repositories, other databases) from which it extracts metadata into a standard form and “normalizes” it into an XML or PNX record. Primo features include faceted search to refine results, built-in federated searching, “did you mean” spell-check based on the library’s catalog metadata, user tagging, and user-customizable views. A new feature, called “third node searching,” converts remote compatible databases to a Primo-type index for faster searching. Initial feedback from their students has been positive, and the Primo interface is increasing the visibility of their TV news archives.

WorldCat Local
Richard Jost, the final speaker, discussed the University of Washington’s experience with WorldCat Local, even though their law library is not yet implementing WorldCat Local. He was able to draw upon these experiences based on the main library. Their implementation searches three catalogs and four article databases through one interface, including links to full text via an OpenURL resolver. WorldCat Local is still under development and not officially in release; UW is a beta partner on the project. They are still doing testing on design, the results algorithm, and request methods.

Results can be sorted for the user: In UW’s case they display UW libraries first, consortial libraries second, and WorldCat results last. If all UW/consortial copies are checked out, the system automatically brings up an ILL form. The ease in which items can now be requested from non-UW libraries has increased borrowing significantly. Search results are displayed in a tabbed format so users can easily navigate to information about subjects, editions, libraries holding the item, item details, and reviews. WorldCat Local also offers faceted search, advanced search options and a built-in SFX-like link for articles. One drawback is that WorldCat Local does not contain any third-party resources for which OCLC does not have a license to put in WorldCat, such as Early English Books Online and some microform sets. For those materials users must return to the current catalog. Richard mentioned he expected these materials would eventually be included, but it will depend on OCLC obtaining the relevant licenses.
The Q&A session afterward revealed some interesting similarities and differences among the systems. Most systems highlight the user’s search terms in results, although this wasn’t always apparent from the PowerPoint screenshots. Most also allow libraries some control over how results are displayed and sorted. Interestingly, none of the libraries had done a multi-vendor evaluation before choosing their now-implemented platform: three of the four were development partners or beta test sites, and Cerritos College chose EPS because it came with their new SirsiDynix system. In response to a comment from the audience that faceting is breaking apart pre-coordinated data, all four librarians said they did not believe anything was being lost by this. Instead, users are now finding things they never would have before, and faceting is an improvement over plain keyword searching.

Program Report

The Librarian as Author: AALL/LexisNexis Call for Papers

As a member of AALL for 29 years, I had never attended the Call for Papers program at the annual convention. When Brian Striman, editor of TSLL, called for volunteer reviewers, I decided it was about time that I attended and so signed up to do the review. I had assumed that the winners would be reading their papers in their entirety. Much to my surprise and secret delight, this was not the case. The three authors presented short summaries of their articles. The information they presented was just the right amount to pique my interest so that I wanted to read their entire articles. Each speaker also suggested some writing tips. Joseph Gerken, chair of the AALL/LexisNexis Call for Papers Series, introduced the speakers. Michael Chiorazzi, editor of Legal Reference Services Quarterly, gave a short keynote address on the value of writing to the profession and to the writer.

The first speaker, Judith Lihosit, Instruction and Outreach Specialist at the University of San Diego Legal Research Center, was the winner in the Open Member Division. The title of her article was “Research in the Wild: CALR and the Role of Informal Apprenticeship in Attorney Training.” Lihosit has created a model of how practicing attorneys do legal research. The current literature assumes they do research the way they learned in law school with a dependence on the West Digest System. Lihosit asserts that their “knowledge base” comes from social networks which provide an informal apprenticeship network for attorneys. She hopes that this model will be a “counter” to the current literature that assumes that the move from print to online resources will cause a “crisis in the legal system.” She says “the informational playing field should remain relatively constant despite any changes in format of legal tools. Any of those changes will be filtered through the network of attorneys which adapts itself to external conditions.” This model may also be of value to librarians by giving them an understanding of how attorneys actually do legal research and should help them in structuring training. Librarians, also, could create formal networking sites to assist attorneys. Lihosit concluded her talk by sharing tips that helped her in completing her article, such as getting feedback from others, having external deadlines, and selecting a topic that is interesting to oneself.

The second speaker, Julie M. Jones, Head of Information Services and Lecturer of Law, Cornell University Law Library, was the co-winner in the New Members Division. The title of her article was “Not Just Key Numbers and Keywords Anymore: How User Interface Affects Legal Research.” Jones, a teacher of legal research, felt that law students had a difficult time doing legal research and believed it wasn’t just because they were new to the law. She undertook a study of Westlaw and Lexis interfaces and looked at usability issues. In order to do this, she had to learn how to do research in two areas that were new to her: human to computer interaction (HCI) and information foraging theory. She said that HCI had its historical roots in “eye tracking”--how human eyes navigate. She showed the audience some early pictures of this type of research with the poor subjects hooked up to electrodes on their eyelids. The research has shown that top left navigation works well, that people tend to ignore the right side of the screen, they only click on the first or second link, banners at the top are ignored, and people don’t like to scroll. She analyzed how the interfaces of Lexis and Westlaw are constructed. She explained that they use code that presents people with choices, and that this “choice architecture” can be used to control user behavior. The next thing she looked at was information foraging theory. She used as her analogy an “information bear” foraging for the best information for the least amount of energy. In information technology, this is called the “access costs.” Jones then looked at the access costs in Lexis and Westlaw. Jones was fortunate to have a lot of institutional support for her writing and she made a point to set aside time to work on her article.

I-Wei Wang, Reference Librarian, University of California, Berkeley School of Law Library, was the third speaker on the program. She was co-winner in the New Members Division. The title of her article was “Schoolhouse Rock is No Longer Enough: the Presidential Signing Statements Controversy and its Implications for Library Professionals.” Wang chose this topic for a library school paper in 2006 because it was a hot topic in the news at the time. Confirmation hearings were being
held for Samuel Alito, who had been in the Reagan administration when, in 1982, he proposed that presidential signing papers be included in USCAN. This was controversial because it was questionable if they were part of the legislative history. Wang had considered continuing her research on the topic and the Call for Papers gave her the impetus to update her research and present a librarian’s point of view. As the two previous speakers also related, an external deadline proved to be a very motivating factor in completing the writing project. In her paper, Wang reviews the public discourse—public, popular, and academic—on presidential signing statements, in particular those of President George Bush. She then compares Bush’s use of signing statements with their use by former presidents. She believes that historical comparison is critical in order to understand the debate on the constitutionality of what basically has become a line item veto to legislation, and questions whether this is a “proper” executive branch power. She expects this to be a continuing issue, whether or not the next president uses signing statements in the same manner as President Bush.

The depth and range of the authors’ topics were outstanding. It’s exciting to see librarians doing this type of research and adding to our professional literature. My personal favorite was the second article by Julie Jones because I am very intrigued by how website design influences people’s ability to conduct effective searches. Congratulations to all three authors for their winning entries.

Program Report

The Good, the Bad, the Ugly: Rethinking Bibliographic Services in the 21st Century

Reported by
Sharon L. Nelson
Northern Illinois University
College of Law Library

Presenters:
Richard Amelung, Saint Louis University, Omer Poo Law Library
Diane I. Hillmann, Director of Metadata Initiatives, the Information Institute of Syracuse

This session began with Richard Amelung, the AALL representative to the Working Group on the Future of Bibliographic Control presenting an overview of the Group’s members and of its final report, which was disseminated in November 2007. The full report is available at http://www.loc.gov/bibliographic-future/news/. He clarified several aspects of the report, bulleted below, including the role of the Working Group, and the involvement of non-library parties that have evidently been causing misconceptions among libraries and librarians.

• Working Group members have been careful to make sure they are all sending out the same message to various library communities when individual members of the Group are invited to speak. However, they are not speaking on behalf of the Library of Congress, only the Working Group. Only LC speaks for LC.
• The Working Group is not responding to responses to the report—as Richard noted, “the report’s done, folks!”) However, Working Group members are staying on in an advisory capacity to LC.
• The report was structured to identify what would happen if nothing was done, then provide several recommendations for action and the anticipated outcomes if the recommendations were implemented.
• The report was intentionally “long on ideas, but short on ‘how.’” It was focused on outcomes, not how they might be achieved. In this way, all involved parties would be given the maximum flexibility to develop their own ideas as to how best to achieve a given outcome. Planning for how to achieve these outcomes is what needs to happen next, with detailed steps behind how we will get from Point A to Point B.
• LC is involved with a vast amount of projects, but communication between various areas within LC, and to the outside world in general, about its activities has been an ongoing problem. Many of these projects are in various stages of development, from fully implemented to pilot stages only, but they all seem to get mentioned as if they are all at the same stage, which they are not.
• The Working Group made recommendations to many entities outside of LC and the library/cataloging community, but many of these groups, such as publishers and vendors, need to be convinced of the importance of bibliographic control to their community, and to get involved.
• Standards creation currently takes so long that by the time a standard is completed the community has moved beyond it. Multiple groups are usually involved in standards development, and unfortunately they aren’t always working in a coordinated fashion.

Diane Hillmann took the podium next to present “After the Report,” where she described what she agreed and didn’t agree with in the final version of the report. Her detailed PowerPoint slides are available at http://hdl.handle.net/1813/11115,
even more detailed comments at [http://docs.google.com/View?docid=dn8z3gs_51dsqc77](http://docs.google.com/View?docid=dn8z3gs_51dsqc77). Here are some of the highlights of her presentation:

- In an age of mashups, is there any need to continue seeking the “holy grail” of a “unified philosophy of bibliographic control”? Libraries are no longer the only players in the information universe—yes, we may “do it better” than others, but maybe “good enough” is, in fact, good enough. Can we survive and thrive if we continue to insist on “unified” anything? Do we all have to agree on everything before any progress can be made?
- While the report recommended increasing efficiencies, it’s possible we may have wrung all of the efficiencies possible out of our current systems. It’s time to explore alternate distribution systems beyond our current networks. “Sharing materials” does not necessarily have to take place only within bibliographic utilities. OCLC doesn’t handle images, single items, and media well on an item-level basis. Sharing data about these types of materials may be better handled through other distribution methods.
- Two good things in the report were internationalizing authority files and transforming LCSH.
- Traditional cataloging has focused too long on the secondary products of research. The new mindset needs to be more like that of archivists and Metadata Librarians, focusing on primary materials.
- Without improved abilities for machines to manipulate our data, we are going to be locked out of participating in a world where the web is everyone’s platform. While we need a more flexible and extensible metadata carrier than MARC, LC is not necessarily well prepared to create it.
- The idea of “return on investment” is a non-starter, because right now we really don’t know what “return on investment” truly means, or how to achieve it.
- Suspending work on RDA made vendors breathe a sigh of relief (one less thing to do!)—but it isn’t realistic.

This was a very stimulating discussion, and for folks like me who just couldn’t quite motivate themselves to read the final report in its entirety when it came out, this program provided a good overview of the highlights. It looks like the report will be generating discussion for some time to come, and stimulating the library profession to do some serious thinking about what we will want and need to do with “our” data (if we can even call it “ours” any more!) in the years ahead.

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**Program Report**

**OBS-SIS Program: All Good, No Bad, No Ugly:**

The Conversation Continues

This session provided the opportunity for the audience to comment and ask questions stemming from the D2 program, “The Good, The Bad, The Ugly: Rethinking Bibliographic Control in the 21st Century,” with Richard Amelung (Saint Louis University) and Diane Hillmann (Cornell University). The speakers also informally added further thoughts on their presentations and commented on each other’s statements.

The first attendee to comment made the observation that vendors were not the only ones thrilled about the pause in the publication of RDA. Richard Amelung replied that the main reason RDA was postponed was to allow time for more testing of it with FRBR.

Diane Hillmann wondered if RDA was going far enough and wanted to know what organizations like NISO think of it. She declared MARBI a dinosaur, and argued that we must think about RDA, XML, FRBR, etc. in order to progress from the older model of AACR2 to a more progressive one. She reminded us that RDA is scheduled to be rolled out in October. It isn’t perfect, but it needs to be used by more communities. Ms. Hillmann pointed out that it is no longer true that “one size fits all.” Different communities have different needs for different materials. Law catalogers need to scrutinize how FRBR and RDA handle law materials and document their findings. We need to figure out what we need and how to make things work in a different world. Extensions and choice of rules, rather than separate rules for each user community, will be the key to workability.

When questioned about Martha Yee’s cataloging rules, Ms. Hillmann’s opinion was that they were getting people to talk, not that anything would go forward.
Regarding the need for more studies and research, Mr. Amelung thought library schools should get more active. Ms. Hillmann remarked that those working on Ph.D.’s or tenure focus too narrowly and granularly for their research to be of use to working librarians. Money is needed for studies on bigger issues by working librarians.

Another audience member asked how librarians will deal with the legacy of MARC records and old cataloging rules. Data mapping has already been done, Ms. Hillmann responded. Free text fields, such as 500 notes, are the hardest to parse. It is a question of what can be done with them, what are the meaningful relationships, not where to put them.

We are discovering how much can be done by machine and how much by humans. There are some things only humans can do, but with machines we can add new efficiencies. For instance, with all the data out there, authority control is even more important, no matter what different information providers, such as Google, call it.

Towards the end of the session, I was most struck by Ms. Hillmann’s and Mr. Amelung’s emphasis on the change of mind set in cataloging. Before, cataloging was concerned with what the metadata would look like to a human when in a card or print catalog. Now, cataloging has to be concerned with supplying data and information about data, while machines manipulate that data so humans can read it in ways most suitable to their needs. Concepts can be expressed non-textually. Display and identity need to be pulled apart, much the way they were in WLN or Horizon. Encoding proper relationships and what can be done with them, not where to put data, are the important things. Computers can be programmed to display the data in ways that best fit particular user needs. FRBR, for instance, is not concerned with display, but with identity and relationships. With its incorporation of FRBR, RDA may be said to be the same. And with this change of mind set, Ms. Hillmann declared, “No rule interpretations!”

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**Program Report**

**Exploring Relevancy Ranking Systems in Search Engines on the Web and in our OPACs: What They Are and How They Work**

Reported by Janet McKinney
Shook, Hardy & Bacon L.L.P.

Speaker: Scott Childers, University of Nebraska-Lincoln

The law firm where I work implemented an enterprise search application within the last year, and we still need to tweak the relevancy to optimize the results. The integrated library system we use is also within my area of responsibility. So, I had planned to attend this program before the call for reporters was issued; it seemed a very good match.

In library school those of us of a certain age learned about searching in online databases and the concept of relevancy vs. return. We didn’t really need to know how a system ranked results; after all, we couldn’t do anything about it. To state the obvious, times have changed. In many situations we do need to know how a ranking system operates and can change those settings so our patrons are better served.

Childers competently fulfilled the first learning objective: that attendees would learn the basics of relevancy ranking systems in Internet search engines and in OPACs. He set the stage by defining relevancy and relevancy ranking. He then provided an example of one method of ranking results, involving sets of names of fruit. Words that occurred most frequently in a set were weighted to be more relevant than others. Each ranked set was then included in a small index to illustrate how all the words in the index would determine the ranking of the results.

There are problems with this and many other relevancy ranking systems, and we are familiar with most. Some relate to the imprecision of the language, such as “umbrella” terms (fruit), homographs (tear), context, and spelling differences. And of course, the thorn in the side of catalogers, non-authoritative or repeated descriptive terms added to web pages, which can artificially inflate relevance. Childers reviewed some of the adjustments or solutions that can be employed to address these issues: give more weight when terms are in a particular location in the records or the page, such as a heading, if it is bolded; index phrases in addition to individual terms; examine the terms used in the web pages that link to the site(s) indexed; or examine searches to identify the context.

The second learning objective was that attendees would learn the pros and cons of relevancy ranking systems as they relate to performing library reference service. Unfortunately, this portion of the program was too brief. Childers spoke about search engine optimization in broad terms. He suggested that attendees get to know the algorithm of a search engine as best they can, though the algorithms and ranking systems are tightly guarded trade secrets. Review search logs to identify needs.
for expanding records or page content. Childers then gave what was, for me, the money statement of the program, “You may not be able to control the beast, but you can somewhat control what goes into it.” In other words, if you can’t control the way the content is searched, perhaps you can make adjustments to the content to improve the search or the display of results. It would have been great to see some examples of this, illustrating the point and inspiring the attendees to try it in their own systems.

Questions and answers after the presentation included:

Q. Is it easy to add synonyms to these systems?
A. No, and Childers knew of none that allow that.

Q. Are there just a few of these systems that are sold?
A. No, there are a lot.

Q. Are there any that use social tagging?
A. He was not aware of any search engines that reach into tagging sites.

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**Program Report**

**Energize Your Catalog! Get Electronic Titles Out of Their Silos and into Your OPAC**

Coordination and moderator: Mary Ann Hyatt (University of Oregon); speakers: Mary Jane Kelsey (Yale) and Ilona Tsutsui (University of Oregon).

Mary Ann Hyatt introduced this program by making the point that we spend a lot of money on our library catalogs. And the more titles we put in our catalog, the more relevant it becomes. After all, our users want one-stop shopping, so we should give it to them in the catalog—right? Hey, I’m convinced, but then I’m a cataloger 😊

Mary Jane Kelsey opened her presentation with a challenge to us to focus on our vision of our catalog. She mentioned the redundancy that often exists between data in the OPAC and in web A-Z lists, which present our users with multiple ways to reach the same resource. Yet it is no longer possible to choose an either/or type of approach. We must cover all the bases in order to best serve our users. This OPAC approach raises a number of issues that must be considered:

- How to handle the links—integrate into print records or create separate records?
- Do you want to distinguish media at a browse level in the OPAC?
- Bib display—one record for each media type?
- How to get bib records for e-resource?
- Do you need electronic resources management software?

This slide from Ms. Kelsey’s presentation summarized the issues that were covered in this program quite nicely. She focused on each of the questions individually and showed screen shots that illustrate how certain decisions about these issues played out in the catalog. For example, if you have plans for a faceted catalog, you will most likely need separate bibliographic records for the same print and electronic resource. This leads next to the question of whether you can create these separate records in-house or purchase them from a vendor. The latter route may be necessary if the number of records is high and your staff levels are low. But batch-loading MARC records from a vendor raises other important issues, such as record quality and maintenance/overlay complexities. And now that many of us have loaded these batches into our catalogs, along comes the vendor-neutral bibliographic record to replace these duplicate records representing the same electronic content.

Shifting gears slightly, Ms. Kelsey moved into a discussion of working with an electronic resource management (ERM) system. At Yale, they work with an ERM system and Serial Solutions coverage data. Coding decisions have changed over time, so the ERM gets updated to reflect those. Staff from many different departments are involved in keeping the ERM up to date, which is a time- and labor-intensive process. And if your vision of your catalog is of a portal, then you must also consider federated searching, open URL link resolvers, and content-sensitive linking.

Next up was Ms. Tsutsui, who provided some background on her law library, where they use the ERM system from Innovative Interfaces Inc. and Serial Solutions for coverage data. They utilize both shared and separate records for print and electronic resources. She characterized their goal as wanting to increase the visibility of their electronic resources. They mostly batch-
load vendor records, but sometimes records are also created in-house, one by one. Ms. Tsutsui focused on the specifics of using their ERM system effectively. She also discussed the use of MarcEdit to edit batch MARC records to include local data and emphasized the constant cycle of updates associated with keeping those records accurate and current. This requires a great deal of coordination with their main library and consortia catalogs in terms of timing and system capacity. The speaker closed with the observation that we are moving away from catalogs to search engines.

The handouts provided by Ms. Hyatt are interesting and useful: “Provision of user services by electronic legal publishers” and “Sample letter to vendor to request metasearch and linking services.” She implored us to tell our vendors to produce COUNTER-compliant usage statistics.

At many times throughout this year’s AALL conference, I felt like my head was spinning with all the different systems and acronyms and confusion about how they all relate to each other. This program helped me to realize that we are all in the same boat at least. And it was comforting to hear Ms. Kelsey encourage us to enjoy thinking about our OPAC and the exciting opportunity to focus on discovery and delivery!

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**Program Report**

**The Future of Subject Access in the 21st Century**

Rhonda Lawrence, UCLA (coordinator and moderator); Dr. Barbara Tillett, Library of Congress; and Dr. Lois Mai Chan, University of Kentucky

When thinking about subject access and subject cataloging, two of the top names in the field that come to mind would be Dr. Barbara Tillett and Dr. Lois Mai Chan. This program presented the wonderful opportunity to hear both of these women on the same stage discussing the same topic. With the upheaval in the world of cataloging caused by RDA, FRBR, the Library of Congress (LC) Working Group on the Future of Bibliographic Control, and the Calhoun Report, the role of subject access is a major topic of debate. The Calhoun Report recommended that LC cease updating the Library of Congress Subject Headings (LCSH), and a report by the University of California also recommended this course of action. Librarians are concerned that the work that has gone into subject access will cease and subject access will go the way of typed cards. This program gave AALL attendees the opportunity to hear from these two women about what they see as the future of subject access in the brave new world we are facing.

Dr. Tillett’s talk was titled “Pre- vs. Post-Coordination: CPSO Recommendations 2007 and Genre/Form Report 2008.” Her talk was in two parts, first discussing the CPSO (Cataloging Policy and Support Office of LC) recommendations to Beacher Wiggins in 2007. Mr. Wiggins had commissioned the report to study the future of subject access. While the report itself is only eleven pages long, the appendices are very extensive, and include comments from individuals such as Dr. Chan. The report defines pre-coordination and post-coordination, both of which are elements of LCSH application. Dr. Tillett defined pre-coordination as “combining elements into one heading in anticipation of a search on that compound heading,” while post-coordination is “combining headings or keywords at time of search.” She then focused on the pros and cons of both of these systems. The advantages of pre-coordination include context, disambiguation, suggestibility, and precision, while the disadvantages are its expense, complexity, inflexibility, and tendency to create end-user confusion. Dr. Tillett did not really discuss the advantages of post-coordination, but she did comment on disadvantages such as recall and precision limitations, poor relevance, and less understanding without the context of term strings. Dr. Tillett also discussed the Airlie House Endorsements from 1991 and how these have been virtually completed.

From this point, Dr. Tillett spent the majority of her talk discussing the recommendations contained in the CPSO report. There were five major recommendations:

1. Continue the use of pre-coordinated subject strings.
2. Assist end-users through improved “front end” to the OPAC (including guided search, clustered searching, and some experiments with social tagging).
3. Simplify catalogers’ work through increasing automated LCSH assignments (numerous sub-recommendations in this category).
4. Follow-up on August 2006 survey of LC subject cataloging staff.
5. Offer LCSH in a Simple Knowledge Organization System (SKOS).
Dr. Tillett concluded this discussion by predicting that the future of LCSH will include expanded global use of the system and reduced costs.

She then briefly turned her attention to the 2008 Genre/Form Report. Moving image headings were used as a test, and LC was pleased with the results. CPSO has recommended expanding this to other disciplines, including law headings, and LC is interested in collaborating with AALL on this project.

Dr. Chan began her part of the program by positing three subject heading application options: the string approach of LCSH (pre-coordinated), the faceted approach of FAST (partial pre-coordination), and the descriptor approach (post-coordination). Her question was: Does each approach require a different vocabulary set? Her answer to this question was: No.

Dr. Chan sees LCSH as a mixture of two vocabularies: 1.) Source subject vocabulary (similar to index terms found in a thesaurus), and 2.) Pre-coordinated phrases or subject strings. Because of this, Dr. Chan proposes changing LCSH into two separate files, with the first being the source vocabulary, and the second being a validation file. The source vocabulary would form the building blocks of subject cataloging and/or indexing, while the validation file would contain approved subject strings available for use by librarians and end users. Both of these would meet specific recommendations of the LC Working Group on the Future of Bibliographic Control.

Some of the advantages of a source vocabulary would be: easier to control and maintain, compatible with standards for controlled vocabularies, amenable to different application policies, easier to translate, easier to automate, and more compatible with user-assigned terms in social tagging. The validation file would improve cataloging efficiency, ensure accuracy, and facilitate end-user browsing. In Dr. Chan’s opinion, this two-pronged combination of files would benefit all users: LC and others who wish to continue to use pre-coordinated subject headings would be served, while those who want to switch to faceted and post-coordinated subjects would also be served. It would also permit greater use of social tagging.

Dr. Chan then discussed the phenomenon of social tagging. Its advantages include: user participation, user empowerment, ease of assigning tags, freedom, and current terminology. Its disadvantages include all the ones that librarians are familiar with: lack of terminology control, inability to represent complex subjects, ad hoc words, and scalability. Dr. Chan’s solution to this problem is to suggest and match user-assigned social tagging to LCSH, thus transforming LCSH into a facilitator and enhancer of social tagging.

Dr. Tillett was asked if LC would consider adopting some of Dr. Chan’s suggestions. She replied that LC was already moving in that direction with several initiatives.

The discussion continued at a roundtable at the conclusion of the program.

This program provided an excellent discussion of the issues and possible new directions for subject access. It was hard to condense it down into this short review, and many interesting comments have been omitted. It is well worth purchasing the program audio disc to hear the full discussion.

Program Report

Cool Tools: Energizing Law Librarianship with Web 2.0

All I can say is if you hadn’t consumed enough caffeine before you went into this session, you wouldn’t have needed any after it was over – this program definitely lived up to its subtitle of “Energizing!” The presenters and moderator crammed an incredible amount of information (and enthusiasm) into a ninety-minute session. Detailed handouts are available on the CS-SIS Web site at http://cssis.org/hi-cool-tools-energizing-librarianship-with-web-20-handouts.

The presenters for the session were:
- Deborah Ginsberg, Chicago-Kent College of Law Library, Illinois Institute of Technology, on Web 2.0 Extensions (aka “Widgets for the Masses”)
- Jewel Makda, Washburn University of Topeka School of Law Library, on RSS 101
- Harvey Morrell, University of Baltimore Law Library, on Social Networking
- Bonnie Shucha, University of Wisconsin Law Library, on the Web 2.0 Challenge being sponsored by CS-SIS
- Barbara Ginzburg, Washburn University of Topeka School of Law Library, on filtering RSS feeds
- Kincaid Brown, University of Michigan Law Library, on Open Source Data and Information Tools
Each presenter gave a brief (5-10 minute) overview of his/her technologies. After the overview, the presenters then went to separate “showcase stations” where they demonstrated the technologies used in their libraries and answered questions about them. Unfortunately the amount of time allotted for the showcase sessions meant I would only have time to go to two of the showcases, and I chose Deborah Ginsberg’s session on Web 2.0 extensions and Barbara Ginzburg’s session on filtering RSS.

Deborah’s showcase session focused largely on the use of Yahoo Pipes to take an existing dataset (in .csv, Excel, or RSS format), extract a specific subset of data from it, and display it in a format that can then be posted to a blog, web page, Facebook page, etc. (I’m thinking “New Books List,” but there are many other possible applications.)

Barbara’s session, interestingly enough, also featured the use of Yahoo Pipes, but this time in order to take a collection of RSS feeds, filter them for specific key words (e.g., “law library” or “librarian”), then add the resulting filtered feed to your news aggregator so you can read all of the incorporated feeds as a single feed. She also showed how to set up topic-specific feeds (for example, feeds related to the Supreme Court) that can then be run through Yahoo Pipes and formatted so they can be added to a web page.

Both the showcase sessions I attended were very well received, and audience members at the sessions I attended (and at other stations too) seemed to share in the presenters’ enthusiasm for how these technologies could be used to enhance patron services, back-end processes, and personal productivity. I came away with some good ideas on how I might make use of these technologies both personally and in my library. Because the overview sessions were so fast-paced it was hard to get all the details down in my notes, but thankfully the handouts are very detailed. The overview presentations were videotaped, and individual showcases were supposed to be videotaped too (though I have not yet seen any announcements about when or where the videos will be available). It would also be great if such a session were repeated every year because, as conference attendees saw in David Pogue’s keynote address, new “cool tools” come out daily, and by summer of 2009 there will undoubtedly be many new things to learn about and consider adding to our librarian toolbox.

Program Report

Thinking Outside the Box: How Developing Electronic Serial Standards Can Add Fiber to Your Library’s Diet

Recent years have seen a proliferation of standards and efforts to develop standards. Keeping track of all of them can be a full time job for a librarian. Conference programs represent a good opportunity to learn more about emerging standards and development efforts that may affect libraries everywhere. The three panelists, who briefed a large audience on developing serial standards, conveyed a wealth of experience from different aspects of the information supply chain. They discussed some of the challenges and opportunities that standards development presents, and offered diverse viewpoints on the emerging electronic serials terrain.

Oliver Pesch of EBSCO Information Services gave an update on COUNTER (Counting Online Usage of Networked Electronic Resources) and SUSHI (Standardized Usage Statistics Harvesting Initiative), two standards that enable the transmission and reporting of electronic resource usage statistics. Mr. Pesch has served on the NISO board of directors and is co-chair of the SUSHI protocol development effort.

COUNTER is an effort to standardize the recording and reporting of remotely-accessed electronic resource usage. This includes a code of practice that describes “the content, format, delivery mechanisms and data processing rules for a set of core usage reports that are easily implemented by vendors and easily understood by librarians.” Mr. Pesch emphasized the collaborative nature of the development of COUNTER, from a conversation during a library conference through its acceptance as a national standard.

SUSHI is a protocol for automating the exchange of usage statistics provided by something like a COUNTER-compliant system. It is a communication protocol that supports the automated harvesting of usage statistics. Mr. Pesch stressed, however, that SUSHI is strictly an ingestion and harvesting protocol, which can consolidate usage statistics across a wide range of providers and packages, but does not describe a system. Both SUSHI and COUNTER are enabling technologies that let vendors and libraries design systems that could take advantage of usage data.

Mr. Pesch also discussed the difficulties of counting electronic resource usage statistics, but highlighted the importance of this sort of data for collection development and budgetary decision-making. If comparable statistics from information providers were available, libraries would be able to make more informed decisions to better serve their users.
Yvette Diven of Serials Solutions/ProQuest talked about Project TRANSFER, an effort to create standards for journal transfers between publishers. Ms. Diven is a member of Project TRANSFER’s advisory board.

Project TRANSFER was initially supported by the United Kingdom’s Serials Group. Its aim is to enable publishers to transfer journals between each other in a more efficient manner, while at the same time allowing vital stakeholders, including information service providers, libraries, and users (and their information systems) to become more aware of what is happening to the resources they pay for.

Ms. Diven discussed how the electronic environment has completely changed the way journal transfers between publishers occur. Libraries, publishers, and subscription agents have developed models and workflows to detect and deal with transfers between publishers in a print environment. However, those models and workflows don’t necessarily adapt well to an electronic environment.

After surveying the landscape of the scholarly publishing world, Ms. Diven talked about the details. Similar to COUNTER, Project TRANSFER presents its standard as a code of practice. Included in the code are rules describing transfer of subscription information, maintenance of access, and notification of users. These standards prescribe actions that both sending and receiving publishers would need to take in order to become TRANSFER compliant. A revised version of their code of practice was issued for comment in early 2008. Comments from publishers and interested stakeholders were received and a final code (version 1.0) is expected soon.

Lastly, Nathan Robertson of University of Maryland’s Thurgood Marshall Law Library spoke on the development and extension of the ONIX for Serials standard. With a background in the development of standards and specifications for electronic resources management systems, including involvement in the Digital Library Federation’s Electronic Resource Management Initiative, Mr. Robertson talked about the problems that face librarians, vendors and publishers with electronic serials.

ONIX for Serials is being developed in a partnership between EDitEUR, the international group responsible for electronic commerce standards development in the publishing industry, and NISO. ONIX for Serials is an XML format, which communicates messages and data about serials and subscriptions. It is composed of several message formats including (1) SPS (Serials Products and Subscriptions) which includes bibliographic information, subscription information, and pricing information; (2) SOH (Serials Online Holdings) which is a format for communicating holdings details from a publisher or resource provider; and (3) SRN (Serials Release Notification) which is a format for notifying customers and vendors about the availability of an issue of a serial.

Mr. Robertson highlighted the standard’s aim of facilitating the interoperability of diverse information systems. He also noted the possibility that ONIX Serials Release Notification might help to automate a work process such as claiming, while at the same time enabling the acquisitions department to confirm that it is receiving what it is paying for. ONIX metadata could also be re-used in other systems, such as link resolvers or electronic resource management systems.

Overall, a consistent theme with these emerging standards is an emphasis on enabling automation of processes that electronic resources librarians, vendors and publishers find themselves doing over and over again. As standards such as these are incorporated into systems and used by the various stakeholders, we may find ourselves with more time to do all the other things that need to be done.

**Program Report**

**CRIV Tools: Useful Resources for Working with Information Vendors**

This program was presented on Tuesday, July 15, 2008, and was moderated by Robert R. Myers, Jr. (Case Western Reserve Law Library) and Mary Ann Nelson (University of Iowa Law Library).

The moderators provided an overview of the CRIV Tools website. They discussed what was currently available, the problem of out-of-date content, and their plans for updating the site. Attendees were given surveys to complete asking how they use CRIV Tools, what they would like to see on the site in the future, and whether they would be willing to volunteer to help with the update.
Gail Warren (Virginia State Law Librarian) and Jean Holcomb (Retired Director of King County Law Library) presented this program. These two clever, engaging ladies worked in tandem to suggest ways this room full of administrators could identify and prevent employee burnout. They asked questions of each other, tossing the floor back and forth, effectively holding the attention of their audience.

The program began with Burnout 101: the seven definitions of burnout. It can be a deep-underlying malaise, a mind-body shutdown, cognitive deadness, erosion of self-esteem, unstoppable frustration, emotional withdrawal, and ungoverned emotional outbursts. We were warned not to be overly concerned right away if we notice one of these symptoms in one of our employees. It may be job stress or depression, which are different from burnout. The behavior’s severity, duration, and number of occurrences will signal burnout and the need for intervention.

Why is burnout a problem in the law library environment? A New York Times survey of first-time job seekers asked what they valued most in a job: (1) to be challenged, (2) to be compensated in line with the market-rate, and (3) to have a sense that one is making a contribution to society. In a university law library setting, we may find ourselves constantly trying to persuade the administration that there is a need for the law library. There may be little room for advancement and little opportunity for salary increases. We may find we’re in the same job, with the same responsibilities, year in and year out. Ours is a “helping profession,” and we may suffer from “compassion fatigue.”

What causes burnout?

- Loss of — enthusiasm. Directors are responsible for the emotional climate of the workplace. Happy people are more productive people. Make sure staff members know how their work contributes to the fulfillment of the library’s mission.
- Failure to — establish boundaries. Set specific goals, and properly train and instruct staff members. Don’t let employees flounder.
- Lack of — resources. Make sure employees are challenged. Give them opportunities for professional development, whether it’s seminars or association meetings. Getting together with people who share similar positions can lead to renewed enthusiasm, and validation that they’re doing good work and are not alone in dealing with many of the problems that arise on the job.

What are some identifying symptoms? How can a manager tell when a staff member is suffering from burnout? Jean suggested that we ask ourselves if the employee has lost that “whistle while you work” feeling. Look for physical symptoms, which are similar to stress symptoms. But remember they differ in duration, severity and number of occurrences. Listen for verbal signs of low self-esteem and negativity. There may be a loss in productivity or an obsession with detail to the point where nothing gets done. A formerly reliable person may begin calling in sick more often or begin abusing flex time.

Gail and Jean gave attendees a self-test tool, the “Library Staff Burnout Risk Inventory Tool,” in which we rated various scenarios to help assess how concerned about burnout we ought to be. We rated factors such as high turnover, absenteeism, failure to follow directives, lack of initiative, resistance to change, and dysfunctional workplace dynamics. By adding up the scores, we could determine if there was “little cause for concern,” “moderate cause for concern,” “ongoing efforts to address underlying causes should be increased,” or “crisis intervention needed.”

If the results indicated cause for concern, what could be done? What’s the prescription for relief? Jean and Gail presented quite a list of actions an employer can take to help cure and prevent burnout:

- Praise. Not cliché praise — “Great job!” or “Keep up the good work.” Be specific about what they’ve done to merit your praise.
- Reward. The Golden Rule does NOT apply. What may be a fabulous reward for you, may be a nightmare for someone else. Get to know your employees so you know what “reward” means to them. Encourage and reward individual thinking.
- Fight success tolerance. Practice thought stopping. Stop worry loops. Teach staff how to visualize a stop sign and then “go to a happy place” when they catch themselves thinking negatively. Jean repeats, “Stop sign. Good book and the Caribbean” to help her stop negative, unproductive thoughts.
Set clear boundaries. Provide guidance and explain what it is that employees need to be doing and how the work they’re doing fits into the institution’s mission.

Model appropriate behavior. Demonstrate high ethical standards.

Take a vacation. Make sure employees take a vacation. Employers should take real vacations and not call in, so employees understand that they are trusted to be able to handle everything while the boss is away.

Conduct evaluations. Arrange for staff to take a self-evaluation test like Myers-Briggs to help them identify their strengths and weaknesses. Arrange for anonymous staff evaluations of managers and supervisors. Set measurable goals.

Make time for those you supervise. Talk informally with employees about their lives away from work.

Encourage the establishment of peer networks with other institutions.

Lobby hard for market-rate compensation. Let your staff know you care enough to really go to bat for them. Even if you don’t succeed, they’ll appreciate that you tried.

Share staff successes with higher-ups. If they’d like to, allow employees to present reports of projects they’ve completed to those higher on the hierarchical chart. Give credit where credit is due.

Fit the job to the employee. You’ve got it backwards when you try to fit the employee to the job.

To avoid your own burnout, Jean and Gail suggest creating a buffer zone between work and home. Do something to help you transition from home to work and work to home. Use the drive or ride to and from work to decompress. Go to the gym or walk after work and before going home. Understand your own pressure points and address them. Invest in happiness. Get involved in something that isn’t law library related. Understand your energy level patterns (Are you a morning person or an evening person?) and arrange your schedule accordingly. Find your own mentor and/or social network for support.

When intervention is needed, address problems immediately, be specific, ask why intervention is necessary, ask for suggestions, offer health care referral, and be as flexible with leaves of absence as possible.

Finally, Jean and Gail say to keep in mind that it’s about them, not you. Practice what you preach. And remember, even Pollyanna had a bad day now and then.

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**Program Report**

**Explore the Effective Use of Cataloger’s Desktop/Classification Web**

Reported by

Susan Morrison

Louisiana State University Law Library

Originally intended as two separate programs, these presentations were scheduled back-to-back on the last day of the Annual Meeting.

Bruce Johnson spoke first about Cataloger’s Desktop, the integrated online system that provides access to the most widely used cataloging documentation, including almost 260 resources, and offers interfaces in English, French and Spanish. Mr. Johnson gave a brief history of the development of Cataloger’s Desktop and pointed out its advantages, then demonstrated some of its handier features. He showed the audience how to customize the display and limit it to materials commonly

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**Library Staff Burnout Risk Inventory Tool**

Instructions: Using a scale of 1 to 5 with “1” being not at all descriptive to “5” being very descriptive, rate how descriptive each of the following statements is about your library staff.

<table>
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<tr>
<th>Statement</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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<tr>
<td>High employee turnover rate</td>
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<td>High employee absence rate</td>
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<td>Staff conflict</td>
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<td>Deadlines not met</td>
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<td>Directives not followed</td>
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<td>Staff confusion about goals</td>
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<td>Poor teamwork</td>
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<td>Constant complaining</td>
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<td>Staff fail to respond when asked for input re: decision-making</td>
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<td>Office politics interfere with performance</td>
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<td>Decline in customer service standards</td>
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<tr>
<td>Lack of initiative</td>
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<td>Resistance to change</td>
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<td>Extremes of activity – always monotonous or chaotic</td>
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<td>Dysfunctional workplace dynamics</td>
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</tbody>
</table>

Total:

**Scoring:**

- 15 – 25 total points: Little cause for concern
- 26 – 40 total points: Moderate cause for concern with preventative strategies indicated
- 41 – 53 total points: Ongoing efforts to address underlying causes should be increased
- 54 – 75 total points: Crisis intervention needed
used by the individual subscriber. He also demonstrated how to bookmark particular sections of individual resources which are frequently referenced by the user. Hypertext links allow the user to view related materials, and the searching function enables searching across resources. Mr. Johnson encouraged new subscribers to click on the online tutorial and to join the Cataloger’s Desktop listserv to keep up on latest developments.

Cheryl Cook gave a quick demonstration of Classification Web (Class Web). Class Web is the most up-to-date version available of the LC classification schedules, updated weekly. It was originally designed for editing MARC class records at the Library of Congress and has been available since May of 2002. In addition to the class schedules, Class Web provides access to Library of Congress Subject Headings. It can also correlate subject headings with the most commonly used class numbers (and vice versa). Plans for future enhancements to the product include navigation improvements, possible inclusion of the Library of Congress name authority file, and conversion of the “lettered links” in the class schedules to pull-down menus.

These presentations were both interesting and informative. As a side note, the majority of the audience indicated that they presently used one or both of the products discussed. As one who used both, I was glad for the opportunity to pick up some tips regarding these two very helpful tools.

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**Program Report**

**Tales from the Dark Side, or If I Knew Then What I Know Now**

This program was presented on Tuesday, July 15, 2008 and was moderated by Dina Dreifuerst (Budget and Acquisitions Librarian with Bracewell & Giuliani LLP and formerly Library Relations Manager for Jones McClure Publishing). The other two panel members were Susan Skyzinski (now with Greenberg Traurig and formerly with LexisNexis) and Catherine Whitney (now with GSI and formerly with various law firms).

This was a thirty-minute program to help law librarians understand that vendor representatives are out there to help. The idea is to work with your vendor representatives and not against them. The panelists spoke from their experience on both sides of the table.

If you have good relationships with your vendor representatives, they will be more willing to work with you when needed. Ms. Skyzinski noted that commitment on both sides is more helpful in accomplishing what needs to be done. A better understanding of needs on both sides is important.

Ms. Whitney stressed the importance of maintaining a trust relationship. She asked librarians to keep the lines of communication open. The decisions made together are actually business decisions, including contract negotiations. Remember that the vendors want the librarians to look good. That can happen if the librarians provide necessary information about their firms and their libraries to the vendors. On their side, vendors need to be aware of librarians’ time constraints. They need to be sensitive to the fact that librarians have their own jobs to get done. Vendor representatives should make appointments and not just show up, most definitely not as a group!

Ms. Dreifuerst cautioned that librarians need to understand that just because they are friendly, vendor representatives are not always free to grant favors. They will need to convey requests to their bosses. If you need something, make sure that you have sound justification for it.

Ms. Skyzinski discussed the reasoning behind companies changing vendor representatives. It is great to develop relationships, but sometimes companies need to use their employees in different capacities. This could be due to changes in company structure, personnel changes, and/or economic and fiscal climate changes.

Ms. Whitney made it clear that negotiation should be win-win. Communication of needs, expectations, and limitations will help provide the most equitable solution for all. Vendors do want libraries to get what they need, within reason. Librarians should discuss their firms’ purchasing decision-making process with their vendor representatives, which will give them some idea of the time frame involved.

Ms. Dreifuerst discussed direct contact with attorneys. Firm librarians need to let vendor representatives know that they should not be going directly to the firm’s attorneys. Instead, the librarians need to keep their doors as open as possible. If
representatives appear at bad times, explain why you cannot talk right then, but ask them to try again later. Also, make sure your firm’s attorneys know that they should refer representatives to the library.

Other items discussed were avoiding “library speak” when talking with vendors, and price issues. Discuss your budget with vendors and negotiate for better prices, especially for items you need. If you can’t get something on reasonable terms, walk away. Another topic was patience: Let vendors know when you need something immediately, but keep in mind that they have to work within their companies’ constraints. Provide feedback. And when you need something, remember to simply ask. “If you don’t ask, you don’t get.”

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**Program Report**

**TS-SIS Hot Topic: Technical Services and the Three Rs: Reinventing, Restructuring, and Renewing**

This panel presentation featured three speakers discussing how they have recently redesigned their technical services departments and/or workflows to keep up with changing demands on their libraries – as well as changing budgets.

Kathy Winzer of the Robert Crown Law Library, Stanford University, spoke on behalf of Paul Lomio, the library’s director, who was unable to attend. Their philosophy is that all staff should have client contact, and that since the library staff is not going to grow they need to always be on the lookout for outmoded procedures and ways to increase productivity. They eliminated the “technical services” and “public services” department designations and the library organizational structure is now fairly flat, and relaxed; staff members are encouraged to work across (former) departmental divisions. (The “Judges’ Memorials” project, reported on p. 38 of the May 2008 *AALL Spectrum*, was one such cross-departmental project where everyone pitched in.) Everyone in the library does a weekly update, which is shared with everyone else on the staff; this has proved very valuable in fostering communication and letting everyone know what everyone else is doing.

Barbara Garavaglia, Assistant Director, University of Michigan Law Library, spoke next on “Creating One Library.” The reason they decided to go through their reorganization was to improve service throughout the library by increasing organizational flexibility, working collaboratively, improving and modernizing processes so as to increase timeliness of service (but without compromising quality), and providing staff with new opportunities for job satisfaction and professional growth and development. While they had been thinking about a reorganization for years, the timing of the resignation and upcoming retirements of some key personnel, as well as an administrative request to reduce their budget by 16 percent, triggered the process in the fall of 2007. The intent was to reorganize quickly to minimize disruption; however, Barbara admitted that in the rush to reorganize, they failed to keep staff fully informed as to what was going on, leading to a high level of stress and anxiety during the process. This has since been remedied (through a series of staff and individual meetings), and the flatter structure, anchored by eight “functional units,” has led to an environment that is more flexible and collaborative, with more opportunities for cross-training, backup of essential processes, and staff training and development opportunities. There are no “clerical” positions – everyone is either a librarian or a professional, and essentially no positions were lost – there were 39 positions before the reorganization, and 38 positions afterwards. A staff directory showing the new “functional units” can be seen at [http://www.law.umich.edu/library/info/contact/Pages/units.aspx](http://www.law.umich.edu/library/info/contact/Pages/units.aspx).

Edward T. Hart of the University of Florida Lawton Chiles Legal Information Center, spoke last on “A Work in Progress.” During his time at the library, it has moved to a new integrated library system, moved off-site during renovations (to an abandoned grocery store), and endured a flat budget for seven years. His library returned to having an official head of Technical Services, on a par with the head of Public Services, with responsibility for the coordination of the whole department. Since he has a J.D., he can serve as a faculty liaison and do collection development, and as T.S. head he can represent “one voice” for the library to the campus and university systems. He works in a strong “communications partnership” with their cataloger, and has delegated day-to-day acquisitions and serials functions to experienced paraprofessionals. It’s a system that’s worked well for their staff and their situation.

The Q&A session following the presentation featured several questions on the nuts and bolts of reorganization. All three institutions were not unionized, so that aspect did not affect their reorganization plans. Stanford has cross-trained some of its public services staff in physical processing (so priority and rush materials can be expedited); they still check in serials, but don’t date-stamp them any longer, and one of the reference librarians is involved in reclassifying European Community
materials. At the University of Florida, some public services staff have been trained to do basic holdings maintenance. Who
does staff evaluations for whom at Michigan is still evolving, but is gradually getting straightened out.

The takeaway I got from this discussion is that the need for the work traditionally described as “technical services” still very
much needs to be done in today’s libraries, and likely will be for the foreseeable future – but the nature of the materials to
be managed, as well as where and how the work is done and who is going to do it, is going to be in flux for the foreseeable
future too.

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**Program Report**

**Demystifying Batch-Load Analysis: What You Need to Know about Vendor-Supplied Bibliographic Records**

Reported by

Lia Contursi

Diamond Law Library

Columbia Law School

Speaker: Yael Mandelstam, Fordham University
Coordinator: Ellen McGrath, University of Buffalo
Moderator: Kevin Butterfield, College of William and Mary.

Technical services administrators sometimes acquire batch loads of bibliographic records from commercial vendors without
knowing their quality. Some of the most popular products available to law libraries are MOML (The Making of Modern
Law), Serials Solutions, LLMC-Digital, BNA, CALI, Hein Online, and LexisNexis/Westlaw Cassidy Collections. How
can librarians evaluate vendor-supplied bibliographic records? How can they judge the quality of vendors’ packages before
loading the batches of MARC records into their local catalogs? It takes some real detective work to be able to examine
thousands of MARC records and determine their level of accuracy. In this presentation Yael Mandelstam demonstrated
several methods for manipulating large files of MARC records, and discussed a number of strategies for detecting errors
and inconsistencies.

Before starting any investigative test, it is necessary to obtain a computer program that allows the viewing of a single MARC
record, but that can also isolate fields within a file, and thus collect evidence about the degree of accuracy of the data. In her
demonstration, Yael suggested two such programs: Microsoft Excel and MarcEdit. Both are easily available, and offer good
sorting capabilities. The only caveat to remember about Excel is that its 2007 version can accommodate a file containing
approximately 45,000 full MARC records, but its 2003 version can only accommodate around 3000 such records. On the
other hand, MarcEdit is a very versatile program, and can be used for much larger files. It is a freeware application, and is

Yael outlined three steps for analyzing a vendor-supplied batch load. First, it is always a good idea to begin by examining
five to ten MARC records individually. In doing so, check: (1) the general level of cataloging (full, core, or minimal); (2)
the quality of subject headings and classification; and (3) the treatment of the aggregator in the 260, 533 and 710 fields
for material cataloged as monographs, serials, or integrating resources. Yael also offered a few tips useful for scrutinizing
individual records. In her example, she looked at electronic records derived from print material, and therefore made sure that
the 130 and 222 fields were consistent with the format of the material described in the file. She also systematically looked
at the 260 field, to make sure that it was consistent with the standard description prescribed for electronic materials.

Further and more incisive detective work was demonstrated when moving to steps two and three of the process. Step two
consists of counting the total number of each field in the batch by deconstructing the MARC records and manipulating the
fields. Using a batch load file in MarcEdit, Yael pointed the mouse to the “Reports” menu and clicked on “Field Count.” Like
magic, the file now appeared deconstructed into rows, listing each MARC field and subfield with its corresponding number
of occurrences. This display lends itself to multiple reading strategies. In Yael’s example, the examined file contained 9,111
MARC records. With this information in mind, she confirmed that there were exactly 9,111 Leaders and the same number
of 856 fields. This has to be regarded as good evidence that all the records in the file have URLs. However, the same file
contained only nineteen 600 fields, four 610 fields, thirty-eight 650 fields and three 655 fields. This was definitely not a
comforting sign, as it showed that there were far too few subject headings for the 9,111 bibliographic records.

The third and final step of analysis is “isolating fields.” This function allows the display of the same field of each record
in contiguous rows. For instance, each 100 field will be displayed as a single row, and all the rows of 100 fields will be
displayed together, and likewise for all the other fields. Scrolling the groups of fields in the file, the analyst’s detective eye
can scrutinize their coherence, and capture any error or inconsistency. In her example, Yael used this method as another effective reading key to check the conformity of the coding of the 006 field, or the form of names in 1xx/7xx fields, or to make sure that 6xx subdivisions were applied correctly. These are only a few examples of the type of analytical work proposed by Yael. What you could do with your results is open to your creativity with the manipulation of data, and to your own approach to the examination of the deconstructed MARC records in search of clues.

If the number of errors is minimal, it is not difficult to make some global changes with MarcEdit or with the global update function available in systems like Innovative. However, if you find that mistakes and inconsistencies are too many to clean up in-house, Yael suggests that you talk to your vendor, request higher standards, and negotiate to improve the product. You could also choose to contribute to the efforts of the Task Group on Vendor-Supplied Bibliographic Records, part of AALL’s Technical Services SIS Cataloging and Classification Standing Committee. It is a very active group of law catalogers who systematically analyze packages of vendor-supplied batch loads, and develop different strategies to evaluate them. They offer their reviews to TS-SIS members. Keeping an ongoing and open discussion with the vendors, the Task Group offers them various levels of assistance, and recommends appropriate revisions. The Task Group’s aims are to achieve better cooperation and to continuously improve the standards of MARC records in batch loads. This is a quality-control enterprise. It is as efficient and affordable as a homemade artifact. It is cost-effective and highly gratifying. The Task Group has a wiki at http://tsvbr.pbwiki.com where you can find the handout for this program.

**Program Report**

**You Want Me to Do What? Bridging the Gulf and Building Understanding between Technical Services and Public Services Managers**

*Reported by Beverly Burmeister
Valparaiso University School of Law*

Coordinator and Moderator:
Richard M. Jost, Assistant Librarian, Technical Services, University of Washington School of Law

Panel:
Joe Thomas, Head of Technical Services, Notre Dame Law School
Scott Matheson, Web Manager, Yale University Library
Jonathan A. Franklin, Associate Law Librarian, University of Washington School of Law

The catchy title of this OBS-SIS sponsored program reflected quite accurately the content of the presentations and discussion. The moderator and all of the panel members had been part of transitions which involved working across technical services and public services departments. Their experiences reinforced the value of “thinking out of the box” regarding what might be considered the stereotypical roles of these departments.

Richard Jost acknowledged that stereotypes often contain a kernel of truth, and had some fun with the following characterizations:

- Technical services staff were not “people” persons
- Technical services department structures usually resembled “pyramids” while public services resembled “circles”
- Technical services were OCD (Obsessive-Compulsive Disorder) and reference services were ADD (Attention Deficit Disorder)

He observed that his pre-conference request for anecdotes resulted in comments from only technical services staff. Does that mean that only technical services — and not public services — think there is a problem?

Richard Jost, Jonathan Franklin and Scott Matheson worked together on Serial Solutions installation at the Gallagher Law Library. The work on this project necessarily crossed department boundaries, and they became aware of the extremely different approaches of the departments involved. They realized having a successful project would require figuring out how to work well together despite differences. The clash of cultures of departments was very frustrating to all. Typical of the flattened structure and communication patterns of the reference department, all wanted to be involved in the meetings and to go into a lot of detail. However, technical services staff preferred advance preparation and a more manageable meeting.

The use of a “pre-meeting” of managers to prepare a list of issues was one approach which met everyone’s needs and resulted in more productive meetings. Keeping cross-departmental meetings small and focusing on specific questions were key.
For instance, the serials librarian identified specific questions requiring input from others. Public services was responsible for the look and feel of the installations. Technical services had a better handle on what the system was capable of doing. However, having a fresh perspective, each department might see something that the other hadn’t identified.

With current trends, such as metadata creation and use, there is more blurring of department boundaries. Will these trends lead to blending of functions? Joe Thomas described an example of combining functions. At Notre Dame, a new position has been developed which bridges the gap and combines elements of several departments. This was made possible in part due to the fact that departments get along well at their library. The job description in its entirety will be further developed by the new librarian based on that person’s particular strengths, but it will include online resource knowledge as well as technical skills. It may or may not include reference. Two staff members will report to this new position, including the systems person. The position will reside in technical services, but will include the responsibility of acquiring new resources, developing the expression of e-resources in the catalog, and showing everyone how they will work. One responsibility will be the installation of a new ERM (electronic resource management) product. Thomas emphasized the library’s commitment to taking a fresh look at all positions that open up, with possible new job descriptions created at that time. Potential risks in doing this include drawing attention from forces outside the library, which could have unintended negative results.

University of Washington will be experimenting with having library interns spend three hours per week in each department — technical services, public services and reference. Because students frequently don’t know how libraries work, they will also have an opening session to provide this type of information. Many schools no longer train for technical services. One of the by-products of this is that students don’t know about the computerization aspect of cataloging and find it is more fun than they had thought.

• During general discussion, some additional interesting points were raised:
• Technical services departments tend to be territorial and need to let go and share information and control
• Do smaller libraries have fewer silos between services due to less specialization?
• Backgrounds in technical services may result in better reference librarians due to additional knowledge of system and catalog
• Technical services staff should go to the public view of the catalog to make sure the cataloging is user-friendly

Key ideas from this presentation include:
• Take advantage of increased openness to change created by working on a common goal, such as a new product, to alter the status quo
• Job transitions can be an optimum time to look at how the needs of the institution have changed, and to identify different skill sets required in order to meet current goals
• Cross-training can be valuable to build bridges across staff as well as make us better at our own job responsibilities
• None of these happen “naturally” but require intentional effort

This program provided excellent illustrations which demonstrated that meeting the needs of our continually changing customers often requires pushing the boundaries of our comfort zones, but can result in experiencing new rewards and satisfactions — an important message for us.

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**Program Report**

AALL Keynote Address by David Pogue

(To the tune of The Village People’s “YMCA”)

"Young Man, you were surfin’ along, and then
Dumb Man, you downloaded a song, and then
Young Man, copied it to your ‘pod,
Then a phone call came to tell you,
‘You’ve just been sued by the RIAA!’"

As the personal technology columnist for the New York Times, David Pogue noted that he regularly receives a large number of gadgets to play with, er, test. This, he contends, puts him in a near perfect position to spot technology trends, and he shared with the audience some of his observations at the AALL Annual Meeting’s Opening General Session.
One trend he identified was the melting of boundaries between the telephone and the Internet with the development of VoIP (Voice-over-Internet Protocol) technology, and the increasing number of services being made available. For example, Skype [http://about.skype.com/] permits free Internet calls to anyone else who also has the Skype service. Google has created Goog411 [http://www.google.com/goog411/] for directory assistance. Simply dial 1-800-GOOG411 (1-800-466-4411) and follow the voice cues – city and state, and business name or category. You select your choice, and GOOG411 will connect you — all for free. You can also request a text with more information or a map.

I expect many of us have seen glimpses of the next trend: on-demand services. Of course, Pogue was NOT referring to the patron demands voiced at our reference or circulation desks. He was referring to on-demand music, television, and movies. It started with music, and Napster illustrating how NOT to provide this kind of service. Now there are numerous sites for legally downloading music, enabling users to create music libraries specific to their tastes. The television networks and movie companies followed suit, making programming and movies available for download. The cable company Comcast serves up “on demand” cable which allows subscribers to view their television programs at their convenience. No setting the VCR to record tonight’s episode of Dancing with the Stars because you have class or the kids have a project due; you can watch it later. (Yes, I do really watch Dancing with the Stars.)

Pogue also mentioned the increasing use of wireless capabilities for phone, Internet, and email – again, the boundaries are blurring. And he couldn’t very well get away without commenting on the Web 2.0 phenomenon. He noted that the biggest challenge with sites that allow users to control the content is ethical. Copyright is a big issue, and the new generation of users doesn’t recognize this. In a quick poll, Pogue presented several hypotheticals and asked the audience to raise their hands if they suspected a copyright violation. He got several hands for some of the more questionable activity. However, the same poll given to an audience of college students resulted in NO hands! So educating the new generation on copyright, as well as privacy and credibility, is something he considers a necessity.

Pogue is an entertainer at heart. On his website [http://www.davidpogue.com/bio_photos/index.html] he describes himself as a music/theatre geek, and he spent some time on Broadway aspiring to compose and conduct shows. While his professional life has taken him in a different direction, he still finds an outlet for his musical inclinations by writing new words to popular songs based on technology trends. In addition to the trouncing he gives the RIAA (above), Billy Joel’s “Piano Man” became a commentary about Steve Jobs and Apple Inc. making music and video downloads so popular, and Sonny and Cher’s “I Got You Babe” became “I Got YouTube.” The medley is available on YouTube at [http://www.youtube.com/watch?v=uobhjmv0u5s], and I encourage you to go and have yourself a laugh.

So what does this mean for us? Some of the trends we have seen coming. I joked above about patron demands, but their expectations about service are changing, and we will need to find ways to identify those expectations and meet them at least halfway.

Each year at the ALA Midwinter meeting, LITA [Library & Information Technology Association] presents a program on Top Tech Trends. This past June, two things they identified were open source trends and user mobility. (See Top Tech Trends, pt. 2 on the Surf’s Up blog at [http://surferblue.wordpress.com/2008/06/29/top-tech-trends-pt-2/] for more information on this program.) People seem to be getting more and more accustomed to getting what they want, when (and where) they want it. Users are driving how they want information to be delivered to them, and the vendors of delivery devises and information must change to meet those demands. Pogue told the story about how traditionally the telephone companies controlled the design of cell phones. Steve Jobs at Apple, Inc. approached several telephone companies about supporting his iPhone idea. But because the phone hadn’t been designed yet — it was still a concept, which Jobs was unwilling to share — most of them wouldn’t play. They didn’t want give up their control. Cingular took a chance, and only saw the phone a couple of weeks before the public did. Perhaps we also need to take a chance with our communities and become even more creative in how we provide access — by making our catalogs more usable via cell phone, by making links between the catalog and electronic resources as seamless as possible, and by meeting our patrons wherever they are and on whatever devise they are currently clutching.

(To the tune of “I Got You Babe”)  
“But if all the papers go away  
How will we learn the stories of the day?  
‘Dude, we got YouTube!’
Program Report

PLL-SIS Technical Services Group Program:
Who Moved My Pencils? Managing Change in the Technical Services Department

This program, presented on Tuesday, July 15, 2008, was a result of Joni Cassidy’s efforts on behalf of PLL-SIS’s Technical Services Group. Seattle-based crisis counselor Renee Arcement was the guest speaker for this interactive session.

With all the changes going on in today’s law firm libraries, our stress levels are up quite a bit! The technical services (or whatever you call it now) staff is being inundated with new developments. We have to deal with changes ranging from the simplified K schedules to how we are going to adjust our libraries to complete reorganizations of the staff hierarchy.

How do we handle change? It is not always expected. It can make something different, or replace it all together. Change tends to move us and everything around us in new directions. It makes us ask, “Where are we going?” “What are we doing?” “Where will we end up?”

Renee spoke about the eight lessons on change developed by Michael Fullan in 1993:

Lesson 1. You can’t mandate what matters. (The more complex the change, the less you can force it.)
Lesson 2. Change is a journey, not a blueprint. (Change is non-linear, loaded with uncertainty and excitement, and sometimes perverse.)
Lesson 3. Problems are our friends. (Problems are inevitable and you can’t learn without them.)
Lesson 4. Vision and strategic planning come later. (Premature visions and planning can blind.)
Lesson 5. Individualism and collectivism must have equal power. (There are no one-sided solutions to isolation and group think.)
Lesson 6. Neither centralization nor decentralization work. (Both top-down and bottom-up strategies are necessary.)
Lesson 7. Connection with the wider environment is critical for success. (The best organizations learn externally as well as internally.)
Lesson 8. Every person is a change agent. (Change is too important to leave to experts; personal mind-set and mastery are the ultimate protection.)

These lessons reinforce the values of change, which should be continually woven through the organization with which each of us is involved. Everyone should feel validated and part of the change process.

After Renee told us about change, she had us experience it. Each member of the group participated in one of four different exercises.

Exercise 1. Two teams of three people were formed. Two people facing each other held a rope and the third person jumped. This was relatively easy for those who are even slightly coordinated. Then the change came! The two people holding the rope were asked to turn around with their backs to each other and change to their non-dominant hands. This was much more difficult. Their minds and bodies had to adjust to the change in routine.

Exercise 2. This time there were two teams of two people each. One person was asked to tie a jump rope in a bow around the other person’s arm. Again, this was very easy for those participants old enough to tie their shoes! However, the next part of this exercise involved tying the rope one-handed. This was as hard for the one being tied as it was for the one doing the tying. Imagine the frustration of sitting and watching the other person struggling to work the rope into a bow and not being able to help!

Exercise 3. This exercise was given to three groups of two people each. They had to toss small rubber balls to each other. For some of us, it is hard enough to throw at a target and not miss, or to catch a ball as it is coming towards us. Think about how much harder it was to throw with their non-dominant hands, as the participants did in the second part of the exercise. In the third part of the exercise, the participants changed sides.

Exercise 4. The last exercise was a relay race in which two teams of two used small plastic spoons to scoop mints off a plate and get them as quickly as possible into a bowl across the room. They had to do this with their non-dominant hands and within a three-minute time frame. The team with the most mints in the bowl were the winners. As the game progressed, the time limit was changed to two and a half minutes, and then to two minutes.
The purpose of these exercises was to show us how we can deal with different types of change. They showed how change can cause stress and what we can do to overcome that stress. Strategies include planning, visualizing what the end result should be and how to achieve it, and working with your mind and body to accomplish tasks in the midst of change.

We all handle change in different ways. Some find relief in music or a bubble bath at the end of the day. Others take it out on family members or pets. The idea is to work through the stress of change in a positive way.

Stress is a chemical reaction that can even affect our short-term memory. We need to remember that stress is the way our minds and bodies react to challenges and threats. We need stress to survive. Stress is not necessarily bad; it brings out our creativity and adrenaline to get the job done when needed. Bad stress is when ordinary stress becomes distress, or too much stress. That is when we lose control of the situation and get ourselves into states which make our lives harder.

The signs and symptoms of excess stress are tension, worry and frustration. We are sad and withdrawn. Our work performance suffers because of depression. We become disillusioned and angry, and this results in extreme behavior such as acting out.

The best ways to manage stress are to avoid drugs (including tobacco), decrease negative self-talk, eliminate excessive caffeine intake, exercise and eat regularly, build our network of friends, learn to feel good about doing a competent job instead of expecting perfection from ourselves, learn relaxation skills, and learn practical coping mechanisms.

We can also watch and listen to make sure others are not overloading themselves. We can avoid comments that minimize their problems. They will not think they are unimportant! We can offer reassurance, help, and support, and serve as models for effective coping skills. We can encourage others to use their decision-making skills to create their own solutions to their problems.

Problem solving, managing emotions, and tolerating stress are all essential coping tools. They help to change the situation or get rid of the problem. These skills can help identify and handle the thoughts and feelings that problems can create. Distracting or self-soothing behaviors can help us to tolerate difficult situations.

A strong resistance to change is deeply rooted in our conditioning or historically reinforced feelings. These feelings need to be broken into small pieces that can be resolved. Be mindful of your strength and weaknesses, and express your desire to be a change agent.

This program was extremely helpful, as have been other programs presented in San Antonio and New Orleans for AALL by Renee Arcement. She gets to the problems we face as librarians and as human beings, puts a face on them, and shows how to work through them.