TECHNICAL SERVICES LAW LIBRARIAN

MARC Goes Center Stage in St. Louis— "I Never Metadata I Didn't Like"
AALL Centennial Variety Show skit

Reported by Sally Wambold

It probably goes without saying that MARC records are not considered entertainment. This fact aside, the Online Bibliographic Services Special Interest Section (OBS-SIS) presented a dramatic reading of a MARC record to an enthusiastic audience at the Centennial Variety Show at the St. Louis Centennial Meeting of the American Association of Law Libraries. The brief skit even got a mention in Bob Berring's Plenary Address the next day!!!

How did this come about? The dramatic reading was the brainchild of Andrea Rabbia, who also selected the title the cast read because of its humorous value and its legal connections: *Don't pee on my leg and tell me it's raining* by Judge Judy. Janet Hedin, a Reference Librarian at Michigan State University College of Law Library and recent library school graduate, delivered our sample tape to Centennial Variety Show host Kelly Browne, who reputedly bent over double laughing. Janet also wrote the first script and developed the PowerPoint display. Pam Deemer

From Left to Right: Chris Long, Andrea Rabbia, Karen Selden, Betty Roeske, Peggy Perrin, Angelina Joseph, Pam Deemer, Curt Conklin, Mila Rush, and Sally Wambold

*A Publication of the Technical Services Special Interest Section and the
Online Bibliographic Services Special Interest Section of the American Association of Law Libraries*

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T echnical Services Special Interest Section

Greetings fellow TS-SISers! I am thrilled to be serving as the 2006-2007 Chair of this hardworking Section, and we are off to a great start already!

A year ago Karen Douglas, our immediate past TS-SIS chair, wrote in her column about change. She must have been prescient, because 2006 was filled with lots of changes on the technical services scene. St. Louis was the first annual meeting where major annual programming changes were implemented, thanks in large part to our 2004 TS-SIS Ad-Hoc Committee on Annual Meeting Programming, the brainchild of Cindy May, our outgoing past TS SIS chair, and to the flexibility of the then AALL President, Tory Trotta. In 2006 we were able to schedule SIS programming, committee meetings and roundtables opposite AALL educational programming. Therefore in April 2006 when LC announced it would no longer create or provide access to series, TS-SIS was able at the last minute to schedule a hot topic program on the LC SARS decision at the July 2006 meeting. However, while we have made significant progress in reshaping the AALL annual meeting program structure, we have additional goals to accomplish. Stay tuned to this column for more on annual programming changes and the Ad-Hoc Committee we have resurrected to oversee the ongoing process.

As in years past at the annual meeting, our jointly sponsored SIS "alphabet soup" reception was very well attended. We owe a debt of gratitude once again to Innovative Interfaces for its generous sponsorship, and to Brian Striman and the Joint Reception Committee for organizing the event, and also to Janice Anderson, our other member-at-large, who oversaw the staffing of the TS-SIS activities table, and the procurement of all the fun give-aways.

A highlight of our annual business meeting was of course the presentation of the 2006 Renee D. Chapman award to Georgia Briscoe, Associate Director, and Head of Technical Services at the University of Colorado Law Library. Congratulations to Georgia on this well-deserved honor. And for the first time, the Board was very pleased to recognize publicly other TS-SIS members for their dedicated years of service by awarding certificates of appreciation to Betty Roeske, outgoing TS-SIS Discussion list manager for 13 years; and to Martin Wisneski, ongoing TS-SIS web manager. We have so many great volunteers in this Section who toil for neither fame nor fortune as their reward— and we recognize them with our deepest appreciation and respect.

In this issue contributors submitted their reports from a host of the 2006 program offerings in St. Louis, so to avoid duplication of efforts, I want to focus on the work of the Education Committee for the 2007 AALL annual meeting in New Orleans. As a result of a change in our TS-SIS Handbook last year, the vice chair/chair-elect officer now also serves as chair of the Education Committee, shepherding the program and workshop proposals developed for the annual meeting the year that s/he serves as chair. Our committee began working in June, and by August 15th we had worked with program coordinators to sponsor 11 TS-SIS programs, 3 workshop proposals, and, to co-sponsor with OBS-SIS 2 additional programs.

There is no way I can sufficiently thank all of the TS-SIS members who made proposals and the TS-SIS Education Committee members who helped to solicit, define, refine, revise, rewrite, and coordinate our total package. I am so grateful to our Education Committee members for their devotion to this effort. The members are: Alan Keely, Ajaye Bloomstone, Jolande E. Goldberg, Jim Mumm, Carol Avery Nicholson, Jean Pajerek, Teresa A. Parker-Bellamy, Paula Tejeda, and Patricia Turpening. It was a magnificent team effort, and required that everyone on the committee assume individual responsibility for our collective success. We all lost track of how many conference calls and e-mails were exchanged. Our work paid off! In early October the Annual Meeting Program Committee (AMPC) informed us that a record number of our TS-SIS sponsored program and workshop proposals were approved. Our 2007 programming includes:

AMPC Approved Workshop Proposals

- Delivering the Goods: Effective and Efficient Acquisitions Processes
- The Future is Digital: Metadata Standards and Applications

AMPC Approved Program Proposals (in alphabetical order)

- Bringing the Library to the User: the Theory (co-sponsored by OBS-SIS)
- Bringing the Library to the User: the Practice (co-sponsored by OBS-SIS)
- Collection Analysis Made Easy: OCLC's WorldCat Collection Analysis Service (OBS-SIS program; we are co-sponsoring)

- The Future of Cataloging
- What to Count, What to Report: the Revised ABA Annual Questionnaire

In addition, TS-SIS is sponsoring the following programs:

- Indigenous Government in the Americas: Electronic Gateway to Organization and Law
- The Next Katrina: Are You Ready?
- Resource Description and Access: Rising to the Challenge of a New Cataloging Code
- Blogging and Beyond: New Communication Streams for Technical Services Librarians
- Casting a Wider Net: the Challenges and Rewards of Making your Online Catalog a Useful Tool beyond the Law Library
- Tips and Tricks for Successful Vendor Negotiations

So there will be many reasons to attend the 2007 AALL meeting in New Orleans---check back here for more information in the months ahead.

And now for more very heartfelt gratitude. First, a big thank you to all the departing officers and committee chairs for their dedicated service: Cindy May, TS-SIS Immediate Past Chair; Lorna Tang, Acquisitions Standing Committee Chair; Karen Nuckolls, Cataloging & Classification Standing Committee Chair; Member-at-Large Brian Striman (who fortunately is still serving as our beloved *TSLL* editor); Pam Deemer, Awards Committee Chair; Virginia Bryant, Nominations Committee Chair; Caitlin Robinson, Joint Research Committee Chair; Betty Roeske, TS-SIS Discussion List Manager for 13 years; and Susan Goldner, *TSLL* Liaison, 2004-2006.

I also look forward to working with all the returning officers and Board members:

Karen Douglas, TS-SIS Immediate Past Chair; Pat Turpening, Preservation Standing Committee Chair; Carol Avery Nicholson, Serials Standing Committee Chair; Janice Anderson, Member-at-Large; Kathy Winzer, ALA CC: DA Representative; George Prager, ALA MARBI Representative; Yael Mandelstrom, SAC Representative, Martin Wisneski, Web Manager; Brian Striman, *TSLL* Editor-in-Chief, and Ismael Gullon, *TSLL* Liaison, 2005-2007.

Finally, I'd like to welcome aboard our new officers, committee chairs and representatives: Alan Keely, Vice Chair/Chair-Elect; Siam Mirkin, Secretary-Treasurer; Ajaye Bloomstone, Acquisitions Standing Committee Chair; Jean Pajerek, Cataloging & Classification Standing Committee Chair; Marie Whited, Member-at-Large; Mira Greene, TS-SIS Discussion List Manager, and Jeffrey T. Bowen, ongoing Membership Committee Chair; and Jason A. Eiseman, *TSLL* Liaison, 2006-2008.

Rhonda K. Lawrence
UCLA School of Law Hugh & Hazel Darling Law Library

Online Bibliographic Services Special Interest Section

You have given me a wonderful opportunity to lead my favorite group in AALL this year. As Anne Myers said during our business meeting, "these are my people."

OBS-SIS in St. Louis

We welcomed the freedom to offer expanded "informal" programming during the St. Louis meeting and used it in a variety of ways. In addition to a workshop and three official programs, we had four informal programs, four roundtables, two committee meetings, board meetings and a business meeting. The down side is that with more choices there are more conflicts than ever. We will do our best to avoid them, but I'm afraid they are with us to stay.

You will find reports of the programs and meeting minutes in this issue of *TSLL*. The Education Committee, led by Richard Jost, did a wonderful job of putting together interesting and informative programs. We should all give a big thank you to everyone who worked on a program, whether they coordinated, moderated, spoke, asked questions, made comments, or wrote a report.

We tried a totally new format for programming this year. We called it a Vendor Showcase and the topic was Electronic Resource Management (ERM). During two sessions, four vendors (Endeavor, ExLibris, Innovative, and Serials Solutions) presented their ERM products. I appreciate the vendors' willingness to participate in this experiment and pay the AV expenses involved. The following day the Local Systems Committee held an open discussion on the topic. During the discussion, led by Mary Jane Kelsey, reports on library experiences with ERM were given by Kevin Butterfield, Melanie Cornell, and Stephanie Schmitt. This format proved to be so helpful that we intend to follow the same format with a different topic next year.

Shortly before the St. Louis meeting, RLG & OCLC made their startling merger announcement. Not surprisingly, this creates a great deal of stress among RLG librarians who have many, many questions. On top of that, current OCLC users must deal with changes, including the implementation of MARC holdings. The OCLC and RLIN Committee chairs, Pamela Deemer and Ming Lu worked together to provide two programs and two open discussions about these issues. Attendance at all of them showed just how relevant they were.

One program dealt with the merger and provided an opportunity to ask and answer many of our questions. The second program introduced OCLC's use of MARC holdings and gave a general overview of their collection analysis service. Glenn Patton, of OCLC's WorldCat Quality Management Division, was the speaker for both programs. He and Eric Childress, of OCLC's Research Division, graciously participated in both discussion sessions.

This year, Pam and Ming will cochair an OCLC/RLIN committee. To help libraries deal with ongoing OCLC issues, they have established two related discussion lists, one for OCLC and one for the transition from RLIN to OCLC. At next year's meeting, we will have a bylaws vote to formally change the committee structure.

Look on our website under Education to find "handouts" from several of our informal programs.

As a result of last year's program "Nabbing vs. Sharing: Z39.50 and the Ethics of Directly Importing MARC Records," we formed a committee to determine if formal guidelines are needed in this area. Lead by Patricia Callahan, the committee had an open meeting where a wide divergence of views was expressed. The committee will continue its work and conduct a survey during this coming year.

The annual Alphabet Reception was a big success. Stephanie Schmitt worked with representatives of the other SISs involved to give us a wonderful opportunity to join up with old friends and meet new ones. Thank you Step, and thank you Innovative Interfaces Inc. for sponsoring our opening event once again.

We were well represented in the exhibit hall by a table organized by Caitlin Robinson. She continued our traditional book swap. Did everyone get an "I love metadata" sticker?

Who is OBS?

Every year, the vice chair does a survey of the membership. The complete results are on our OBS website. In this year's survey, I added three questions to try to find out a little bit about the people who join OBS. Of course, I can only tell you about the 71 of us who answered the survey (25%). Please take 10 minutes to fill out this year's survey!

- 88% of us are academics, with only a handful of private, court, county or state librarians.

- Not surprisingly, we've been law librarians for a long time:

15+ years experience	61%
10-15 years experience	10%
5-10 years experience	13%
less that 5 years experience	15%

  The encouraging news is that there is a slight increase in the youngest group.

- We have responsibilities all over the library. When asked what areas accounted for at least 10% of their time at work, the number responding to each task was as follows:

Cataloging	54
Administration	40
Serials	33
ILS Management	28
Acquisitions	25
Collection Development	23

Reference	20
Government Documents	11
Web Management	10
IT (general)	8
Preservation	8
Teaching	6
Knowledge Management	5
Interlibrary Loan	5
Circulation	2

So, we have a great deal in common, but our jobs cannot be described in simple terms.

The Coming Year

Continuing board members include Susan Goldner, Chair; Richard Jost, Immediate Past Chair; Kathy Faust, Secretary/ Treasurer; Stephanie Schmitt, Member-at-Large. We are joined by the new board members Andrea Rabbia, Vice Chair/Chair-Elect; and Corinne Jacox, Member-at-Large. Big, big thank yous go to retiring board members Georgia Briscoe and Caitlin Robinson. Both of them contribute their time and talents to OBS over and over. To use a metaphor that Georgia used in her first *From the Chair* column, they leave big shoes for us to fill.

This year's Education Committee submitted one workshop and six program proposals to the AALL Annual Meeting Program Committee. We also cosponsored two TS-SIS programs (and they co-sponsored two of ours). The topics range from MARC holdings to emerging technologies, OPAC theory to management, and OCLC to open source systems.

We started the year by approving a new strategic plan for 2006-2010. Ellen McGrath and her committee worked diligently last year to create it. Now it is up to all of us to follow through with the direction it provides. I hope each of you will take a few minutes to read the plan, which can be found on our website. In my next column, I will talk about things we will do this year to further the plan.

Susan Goldner
University of Arkansas at Little Rock
Bowen School of Law

From the Editor

Introducing the Conference Issue

Approved by the *TSLL* Editorial Board in St. Louis, beginning with the 2006 September issue, and then each subsequent September issue after, will be the AALL annual meeting "conference issue." The reasoning behind this was: (1) to reduce the size of the issue (if we also would have included the 15 regular columns the issue would most likely exceed 50 pages; (2) to take the pressure off the regular *TSLL* columnists to produce a column with the deadline being soon after the annual meeting; and (3) to speed up the time of publication for the September issue by only including the AALL OBS-SIS and TS-SIS meetings, educational programs, forums, roundtables, special "hot topic" programs, and workshops.

As you already know, this first "conference" issue is extremely late. I apologize to the readership for this, as it was not the fault of the *TSLL* staff or conference reporters. In spite of this publication delay, I hope future September issues will be published quickly, so that you can best benefit from the news that came from the AALL annual meeting.

TSLL Annual Report Covering July 2005-July 2006

All four issues for volume 31 were published and are available on the *TSLL* website. The June issue was severely delayed for which the editor-in-chief was responsible, and apologizes to the readership.

Since *TSLL* is only available electronically and no fee is required to access the publication, there are no reports concerning financial matters for either OBS-SIS or TS-SIS. Final print claims have all been met and there are no outstanding financial matters concerning *TSLL* for this annual report.

The 15 primary columns were maintained. The Serials Issues column, which was vacant for a long time, now has columnist Richard Paone contributing. All columns, except for the Description and Entry column, had columnists.

Beginning with the 2006 September issue, the *TSLL* Editorial Board approved that each September issue will be a special "conference issue" and will contain AALL OBS and TS education program reports, plus minutes from various roundtables, forums and discussion groups.

Many *TSLL* projects were placed on hold this year, as the editor-in-chief had other pressing professional responsibilities as president of MAALL. Projects still needing completion are as follows:

1. The *TSLL* Editorial Board will be investigating models for true web-based format to enhance reading online, yet also retaining PDF-type format for those who wish to continue to print the issues. A goal may be to accommodate both demands, or it may be that PDF format is adequate for the near future, and that HTML is not practical or necessary. Concern remains for the lag time required to get issues converted to HTML.

2. More revisions to the *TSLL Structure and Policies* need to be made and approved by the editorial board.

3. The editor-in-chief is working on a *TSLL Author's Guide* (stylistic conventions), which will be made available on the *TSLL* website pending board approval.

4. The editor-in-chief will continue working on a proposal for a possible new column *Cataloging Conundrums*.

5. The editor-in-chief will propose to the board a "book review" column, perhaps with the March or June 2007 issue.

6. The editor-in-chief needs to assign someone on the board to investigate what it will take to get the *TSLL* index published.

7. *TSLL* staff will work on investigating and proposing possible changes to increase the interplay between the *TSLL* website and the *TSLL* publication, e.g. using the website as the portal to the issues or using the website to post ephemera-type information, minor announcements and *TSLL* "news." Any changes would require the approval of the editorial board.

8. The editor-in-chief will be investigating the possibility of having column "templates" that are filled in by the authors and then are sent directly to a *TSLL* URL issue "staging area" where content is checked by proof-readers and then is ready for layout. We are looking at possibly using a master *TSLL* issue template where the columns get plugged into the master template. Layout would simply alter whatever graphics and borders and increase or decrease the spacing alignments.

The editor-in-chief will continue tracking *TSLL* staff and columnists' two-year term dates and reappointment approval dates for the *TSLL* board, as stated in the *Structure and Policies*.

Submitted by
Brian Striman, TSLL Editor-in-Chief

TSLL EDITORIAL POLICY

Technical Services Law Librarian (ISSN 0195-4857) is an official publication of the Technical Services Special Interest Section and the Online Bibliographic Services Special Interest Section of the American Association of Law Libraries.

Statements and opinions of the authors are theirs alone and do not necessarily reflect those of AALL, TS-SIS, OBS-SIS, or the *TSLL* Editorial Board. It carries reports or summaries of AALL annual meeting events and other programs of OBS-SIS and the TS-SIS, acts as the vehicle of communication for SIS committee activities, awards, and announcements, as well as current awareness and short implementation reports. It also publishes regular columns and special articles on a variety of topics related to technical services law librarianship. Prospective authors should contact the editor for content and style information.

Online web-access to *TSLL* is available without subscription

Publication Schedule

Issues are published quarterly in March, June, September, and December.

Deadlines:

V.32:no.2 (Dec. 2006) .... 22 Dec. 2006
V.32:no.3 (Mar. 2007) ....23 Feb. 2007
V.32:no.4 (Jun. 2007) .... .18 May 2007
V.33:no.1 (Sept. 2007)...........24 Aug. 2007

Online Bibliographic Services Special Interest Section
Annual Business Meeting, July 10, 2006

Richard Jost called the meeting to order at 5:30 PM.

Kathy Faust presented the Treasurer's report. As of May 31 OBS had a balance of $665.64 in our treasury. Kathy also reported on the results of the election. Andrea Rabbia is the new vice chair/chair-elect and Corinne Jacox is the new member-at-large.

Appreciation was extended to Susan Goldner for providing Dove chocolates, which she distributed to each person at the meeting. She brought them as a thank-you for filling out the annual survey.

Richard went over this year's programs. The cataloging electronic serials workshop had 25 participants and was very successful. In addition we sponsored meetings/programs on the RLIN/OCLC merger, federated searching, record sharing and two vendor showcases. In addition Richard was at CONELL.

Susan reviewed the program ideas for next year. They included programs on what managers should know about their ILS; WorldCat collection analysis; the University of California report on providing bibliographic services; institutional repositories; digitizing projects; non-traditional metadata databases; SCCTP workshop on MARC holdings; open source software; and a joint discussion with CS and RS to talk about problems with the OPAC. The vendor showcase was so successful that it will be done again next year with different vendors. Richard pointed out that the annual meeting will be one day shorter next year, but the same amount of meetings and programs will be taking place so that people will need to make even more decisions about which programs to attend. Richard also pointed out that the AV costs for official AALL programs are picked up by AALL, and the AV costs for the SIS's informal programs will be picked up by the SIS. Susan added that the vendors represented at the vendor showcase are picking up their AV costs.

Pat Callahan read Ellen McGrath's report on the Strategic Planning Committee. The committee was formed in April 2005. They decided to tighten up the OBS Mission Statement, retaining the three strategic directions and aligning the OBS plan with the AALL strategic plan. The merger of RLIN and OCLC came late in the revision process and the committee decided to use the term "bibliographic utilities" rather than name specific utilities. However since formal committees still retain the RLIN and OCLC names, the Strategic Planning Committee recommends that the committee names be changed and the strategic plan be modified accordingly. The Strategic Planning Committee removed specific mention of the Law Library Systems Directory since the format needs to be more flexible; removed specific language about the timing of the OBS annual survey; added the AALL publications and occasional papers series to the research and publication objective; added the creation of a FAQ for the OBS website; and added mention of the ALA ALCTS and LITA divisions as examples of organizations with similar interests to OBS. After the report was read the plan was adopted by a voice vote.

Brian Striman gave a report on the alphabet soup reception. Innovative gave us $5500 this year, $500 more than last year. More people showed up than were planned for. The food setup in the room was a little odd with a single file for the buffet table, but food was also being passed. This year the room was a little bigger than last year and there was perimeter seating. If we keep this reception on Saturday night next year it will be the same evening as the big opening reception.

Brian also gave a report on *Technical Services Law Librarian*. Things are going well. Although there are plenty of substantial articles, Brian would like to see more guest and feature articles. He will be proposing to the *TSLL* Editorial Board that the September issues, from now on, be devoted exclusively to the AALL Annual Meeting reporting. He is looking for a new law librarian to write a column for that issue. The 30-year index is almost done, but a publisher is yet to be found. He is also trying to make two versions of *TSLL* available—a PDF version and a true web-based product.

Caitlin Robinson reported on the activities table. Karen Selden was thanked for providing handmade gift cards, which will be raffled off.

Mary Jane Kelsey reported on the Local Systems Committee. They worked on the vendor showcase, which was very successful.

Ming Lu reported on the RLIN committee. Because of the merger of RLIN and OCLC this committee will be merged with the OCLC committee. There will be two sessions at the conference devoted to the merger. Susan Goldner mentioned that although there is now only one committee it would have two chairs, one from OCLC, and one from RLIN. The current

chairs will stay on for the next year.

Pam Deemer's OCLC report was read by Richard. There were four OCLC columns in *TSLL* over the year.

After the reports of the two bibliographic utility committees it was remarked that we need to clean up language in the bylaws about the bibliographic utility committee.

Caitlin Robinson had thank you gifts for Sally Wambold and Pam Deemer, both of whom were not at the business meeting, for their work in organizing the OBS entry for the centennial variety show, which was a dramatic reading of a MARC record.

Richard brought up the idea of forming a new committee on emerging technologies. It would start out its life as an ad hoc committee then could change to a standing committee if warranted. It would need to stay distinct from Local Systems and when possible work with other committees in other special interest sections. Richard also proposed that we have a head of systems round table, where management issues could be discussed.

The official OBS baseball cap was passed to Susan to mark her tenure as the new chair. Susan in turn had two gifts for Richard. Since our treasury is a little empty she made him a beautiful ceramic jar that she filled with pieces of Dove chocolate. She also discovered he likes funky snow globes, and presented him with a snow globe of the White House (to much laughter).

The meeting was adjourned at 6:20 PM.

Submitted by Kathy Faust
Secretary/Treasurer

Online Bibliographic Services Special Interest Section
Special Committee on Record Sharing — Minutes and Combined Reports in 3 Parts

PART 1 — Minutes of the meeting
Submitted by Mary Jane Kelsey and Joni Cassidy

Attendees: Elizabeth Bradsher, Pat Callahan (Committee Chair), Ruth Patterson Funabiki, Virginia Bryant, Angelina Joseph, Katrina Piechnik, Susanna DeCecco, Step Schmitt, Robert Rendall, Tom Baker, Donna Rosinski-Kauz, Georgia Briscoe, Karen Selden, Cathy Wagar, Joni Cassidy, Margaret Lundahl, Sheila Cratterjee, Corinne Jacox, Mira Greene, Margaret Cianfrani, William Benemann, Mary Jane Kelsey, Ann Sitkin, Evelyn Ma, Jill Williams, Barbara Washecka, Susan Karpuk. [Thank you to Mary Jane Kelsey, Lillian Goldman Law Library, Yale University and Joni Cassidy, Cassidy Cataloguing Services, for taking notes and recording the main points that were discussed.]

Those in attendance introduced themselves, stated whether or not their library is using a Z39.50 client for either adding acquisitions or cataloging records to the ILS or for WebOPAC searching and what client/system they were using.

Pat Callahan mentioned that this committee grew out of the "Nabbing vs. Sharing: Z39.50 and the Ethics of Directly Importing MARC Records" program coordinated by Georgia Briscoe at the AALL conference in 2005. The Committee was established by Richard Jost, OBS-SIS Chair for 2005-2006.

The Committee decided to turn its meeting at the AALL conference in 2006 into a focus group in order to get an idea of the reaction to some of the issues mentioned below.

Pat pointed out that Z39.50 is the standard used, but the larger issue is libraries' record sharing or "nabbing" policies. She then mentioned two issues to start the discussion. The first discussion starter topic was the OCLC/RLIN merger, and that this event lends a little urgency to the record sharing situation. The second topic was about the University of Texas Law Library, and that their WebOPAC provides instructions on connecting to the TALLONS Z39.50 server. The instructions are listed on the catalog's homepage under the "About the Library" link. Anyone is free to use their catalog for "nabbing" records. But, not all libraries have unlimited WebOPAC logins and if too many libraries or vendors are using a system to "nab" records that the library's patrons might not be able to search its WebOPAC.

Georgia Briscoe said that it is unfair if one library goes to another library consistently and doesn't subscribe to OCLC while

Katrina Piechnik mentioned that cost really isn't the issue. OCLC costs can be relatively low.

Some of the issues discussed and some of the group's opinions were the use of commercial software that promotes the "nabbing" of free records. Joni Cassidy noticed that some of her clients' catalogs were being raided for cataloging. It stopped after she brought it to the attention of those involved.

Some attendees believe that it is up to the profession to set standards, but also mentioned that there are law firms that won't put their cataloging in any shared database in order to protect their research. Some commercial book vendors that sell shelf-ready books complete with cataloging may have used or be using library catalogs to "nab" records that they then sell to other libraries. Other library associations do not seem to have addressed the ethical issue of "nabbing" records, although OCLC has. Some of the attendees are aware that other libraries have "nabbed" records from their catalogs for microform sets that they purchased and questioned the ethics of that. Record "nabbing" is not the issue among people who are part of shared network. It's an issue if you're not part of a network and giving something back.

The group agreed that most of us do want to share our records with others, but that a set of guidelines/code of ethics (similar to the one for interlibrary loan) would be a way to raise awareness about the issue and educate librarians. It would also be useful to give to vendors.

After further discussion the group agreed that a survey of the OBS, TS, PLL Special Interest Sections and of law library directors would be appropriate. A survey will help define the scope of the problem and assist the committee in developing a code of ethics if that seems appropriate.

PART 2
Reported by Donna Rosinski-Kauz and Joni Cassidy

This program was moderated by Patricia Callahan Associate Director for Technical Services, Biddle Law Library, University of Pennsylvania. It was an interesting meeting about libraries' use of Z39.50 interfaces to copy cataloging information and records from other libraries. Most of the meeting attendees were from academic libraries, so the discussion was weighted to their concerns. Everyone agreed that taking records from publicly funded catalogs like the Library of Congress is acceptable use, but not all participants could agree on what would be "stealing." Much of the meeting had participants discussing the need to continue to catalog cooperatively, in light of the merger of RLG and OCLC.

Meeting attendees discussed the possibility of developing catalog record-sharing guidelines. These guidelines would include definitions of fair use and sharing, and would speak to the use of libraries' records by other libraries and by vendors. Attendees discussed whether or not vendors should be allowed to use the same guidelines as individual libraries. Vendor representatives in the meeting asked that their interests be considered in addressing the copying of proprietary catalog records by libraries that have not purchased the records from the vendors.

Attendees discussed the merger of RLG with OCLC, and what effect that may have on the ability to view and use information from other institutions' records, since RLG maintains local catalog records, and OCLC currently gives access to a master level catalog record. At the time of this meeting, details were not available from OCLC as to how they would give access to local cataloging data.

The Library of Congress' CIP program and changes that appear to be taking place within that program were also discussed. Many libraries use the CIP records to provide preliminary acquisitions information in their integrated library systems. If the Library of Congress stops processing CIP information, what effect will this have on individual libraries' processes?

Attendees came away from the meeting thinking about whether or not there should be a formal survey of librarians to help develop voluntary guidelines for record sharing. The survey could be crafted to gauge how librarians are using other libraries' catalog records, and how they are accessing and copying the records. The survey would also be used to measure AALL members' interest in developing a set of guidelines for the use of Z39.50 interfaces. This topic should be revisited throughout the next year and should be discussed at the next AALL meeting in New Orleans. The Committee will most likely develop a survey to be distributed to the membership before the 2007 annual meeting.

PART 3
Reported by Angelina Joseph

[Originally published as "OBS Special Committee on Record Sharing," LLAW newsletter 23, no.4 (summer 2006). Reprinted by permission.]

This special committee was formed as a result of the program entitled "Nabbing vs. Sharing: Z39.50 and the Ethics of Directly

Importing MARC Records" which was presented at the 2005 AALL conference in San Antonio. In addition to TS librarians from various law school libraries, participants included a law firm librarian and Joni Cassidy of Cassidy Cataloging. There was a lively debate for and against the practice of downloading full MARC records from other library catalogs.

Libraries with Z39.50 servers have the ability to search the catalogs of other libraries. Some do this to check whether a particular library owns a title, or to see how another library has cataloged something, or to find a suitable call number or subject headings for a book in hand. However, some libraries download or copy MARC records from other libraries' catalogs in order to avoid paying for them.

Many libraries, at the point of pre-order searching, search other library catalogs, especially the Library of Congress catalog, and download full MARC records if they are available. When the ordered items arrive, these libraries then attach their holdings symbols to a utility's versions of the records that they've previously downloaded. This practice seems to be agreeable to all. But, some libraries never attach their symbols to a utility's records for the purposes of resource-sharing, and cost-sharing, which some view as unethical.

One Innovative Interfaces Inc. (III) user mentioned that III software can block outside users from the catalog. However, that would be a disservice to other libraries that just want to verify a call number or subject heading. Some libraries have no problem if a small library wants to download or copy their MARC records.

OCLC is very concerned about libraries that don't attach their symbols to records for items they own, because it affects record sharing and depletes an important revenue source. Some argue that if OCLC were to lower prices for small libraries, the practice of record "nabbing" would be eliminated to a large extent. Others strongly argue that if a library wants to bypass OCLC and use bibliographic records from other libraries, it should at least get permission; otherwise it is nothing but stealing, and highly unethical.

The discussion continued without any consensus, and in the end the special committee decided to conduct a survey to gather more members' views on this issue.

MINUTES

Technical Services Special Interest Section
Annual Business Meeting, July 9, 2006

The meeting was called to order at 5:32 P.M by TS-SIS chair Karen Douglas. A quorum was verified.

Awards Committee: Pam Deemer presented the Renee D. Chapman Memorial Award to Georgia Briscoe. Pam introduced Barbara Bintliff and Karen Selden, who highlighted Georgia's many professional accomplishments, including her numerous publications, her work at the SIS level, and her contributions to a variety of professional associations. Pam then reported that the committee awarded CONELL grants to Annie Chen and Jill Ryder and an education grant to Yan Yu to attend the electronic serials cataloging workshop.

Chair's Report: Karen Douglas gave a brief report and said that it had been a pleasure working for TS-SIS during the past year.

Secretary/Treasurer Report: Chris Long reported the election results for 2006/2007 offices. Alan Keely was elected Vice Chair/Chair-Elect, Sima Mirkin was elected Secretary/Treasurer, and Marie Whited was elected Member-At-Large. 21% of the ballots were returned. In addition, 3 bylaws proposals were voted on and passed by the membership in May. The projected balance as of July 1, 2006 was $11,742.22.

Member-At-Large Reports

Joint Reception: Brian Striman reported that there was a large turnout for the reception, estimating that at least 300 people showed up, which was about 100 more than expected. He thanked Innovative Interfaces, Inc., on behalf of all the AALL membership who annual enjoy this joint SIS special event, and this year Innovative contributed $5,500.

Activities Table: Janice Anderson reminded members to stop by the table and view the Centennial Committee's slide show presentation that profiles many long-time members of TS-SIS.

Presentation of Certificates

Two certificates of appreciation were presented. One went to Betty Roeske for her long-time service as TS-SIS's electronic discussion list moderator, and the other went to Martin Wisneski for his work as the TS-SIS web manager.

Standing Committee Reports

Acquisitions: Lorna Tang stated that the committee tackled several issues this year. One is the preparation of an acquisitions workshop that will be proposed for the 2007 annual meeting. Other projects have included the revival of a database of foreign vendors of legal materials and the updating of a collection development policies page on the TS-SIS website. Lorna reminded members about the various acquisitions programs, meetings, and roundtables taking place during the annual meeting.

Cataloging and Classification Committee: Karen Nuckolls reported that the cataloging links of the TS-SIS website had been updated. Progress continues to be made on the Resource Description and Access (RDA) document. A number of other hot topics have surfaced recently, and Karen encouraged members to attend the Cataloging & Classification Committee Meeting and the Cataloging and Classification Issues Roundtable later in the week.

Preservation: Pat Turpening stated that a preconference preservation workshop had been planned but was cancelled due to a lack of registrations. Four new subcommittees have been created to deal with various preservation issues.

Serials: Carol Avery Nicholson reported that the committee had updated many of the serials links on the TS-SIS website. A small group has been working on ABA statistics, and she alerted the group that a new method of counting electronic titles is being proposed.

Annual Membership Survey Report: Rhonda Lawrence indicated that the survey for volunteers will now be done by the Membership Committee. Rhonda also stated that persons wanting to belong to a standing committee should no longer assume they are automatically a committee member; they will need to submit their names to the committee chair.

Centennial Committee: Mahnaz Moshfegh replaced Janice Shull as chair of this committee. Mahnaz reported that the committee created a poster chronicling important TS-SIS events since 1979. The committee also created a profile of members who have served for 20 or more years; this profile will also be posted on the TS-SIS website.

Duplicate Exchange: Bonnie Geldmacher reported that 48 libraries participated in the program this year. The authority list was updated, a secondary list was created and the indexing was improved.

Education Committee: Rhonda Lawrence announced that the Education Committee meeting will be held from 11:45 a.m. to 1:00 p.m. on Tuesday, July 11. There are already a number of suggested program proposals, many of which need coordinators.

Joint Research Grant Committee: Chris Long reported for Caitlin Robinson that no applications were received during the past year. Chris took the opportunity to invite members to attend the OBS/TS-SIS Research Roundtable on Tuesday morning, July 11.

Nominating Committee: Virginia Bryant introduced the winners of this year's election: Alan Keely (Vice Chair/Chair-Elect), Sima Mirkin (Secretary/Treasurer), and Marie Whited (Member-At-Large). She thanked all those who ran for office this year, and encouraged others to considering running for office if asked in the future.

Ad Hoc Committee on Membership: this committee was established to attract more members, especially those technical services law librarians who are not currently TS-SIS members.

Online Discussion List: Betty Roeske, outgoing manager of the online discussion list, thanked members for their support over the years.

Website: Martin Wisneski reported that the committee had made significant improvements to the TS-SIS website during the past year, most notably a new design of the initial page.

At this point in the meeting, a vote to convert the Membership Committee from an ad hoc to a permanent administrative committee was conducted by Cindy May. The motion passed.

Bylaws Committee: Cindy May reported that all of the proposed bylaws changes that had been passed by the TS-SIS membership during the past year had been reviewed and accepted by the AALL Bylaws Committee.

TSLL: Brian Striman thanked Cindy May and Julie Stauffer for their work on *TSLL*. Brian also indicated that he always welcomes comments.

Vice-Chair/Chair-Elect Report: Rhonda Lawrence thanked Cindy May for her work in spearheading a major change in the way AALL coordinates programs and meetings. Cindy also worked very hard on the handbook and bylaws this year, and Rhonda presented her with a plaque as a token of appreciation. Rhonda also praised Karen Douglas' effective leadership and communication style, and presented her with a plaque and a gift from the TS-SIS Executive Board.

Meeting adjourned at 6:30 P.M.

Submitted by Chris Long
Secretary/Treasurer

MINUTES

Technical Services Special Interest Section
Acquisitions Committee

The meeting was called to order on Monday July 10, 2006 at 9:00 AM at the America's Center Room 120 by Lorna Tang, Associate Law Librarian for Technical Services, University of Chicago D'Angelo Law Library.

Attendees: Lisa Arm, Melissa Bednarz, Ajaye Bloomstone, Kent Boese, Carmen Brigandi, Heather Buckwalter, Annie Chen, Margaret Cianfarini,Vicky Coulter, Emerita Cuesta , Bonnie Geldmacher, Viji Gubbi, Gail Hartzell, Barb Henigman, Needra Jackson, Alan Keely, Ann Kolodzey, Earlene Kuester, Paul Mastrangelo, Mary McKee, Wendy Moore, Mahnaz Moshfegh, Jim Mumm, Cynthia Myers, Nancy Paul, Anne Robbins, Pat Roncevich, H.C. Singh, Karen Shephard, Julie Stauffer, Catherine Thomas, Dick Vaughan, and Lorna Tang (Chair).

The meeting began at approximately 9:00 a.m. Introduction of attendees was made all around. Lorna announced that Ajaye Bloomstone would be the next chair of the Acquisitions Committee.

Lorna asked about the need for a database of foreign law vendors. Mary Ertel had maintained one at the University of Iowa Law Library, but she has retired. ALA has a list, but it doesn't specify law vendors. Ajaye Bloomstone thought it was a good idea, since she has been using the old one. Recommendations from librarians are needed. Emma Cuesta has a great deal of information on Latin American vendors and she is willing to contact those vendors. She suggested a group of members with different areas of interests. Ajaye volunteered to take the European vendors. The database could be made available on the TS-SIS web site. Another suggestion was to use the Wiki approach. Ajaye Bloomstone, Mahnaz Moshfegh, and Julie Stauffer volunteered to work on this project.

Alan Keely suggested updating the collection development policies on the TS-SIS webpage. The ALL-SIS solicits policies for ABA inspections. Lorna asked if the committee would be interested in transferring our policies to their website and then provide a link to them from the TS-SIS webpage. No one voiced any objections. It was also suggested that the site contain policies from law firm and court libraries. Lorna has someone interested in doing that.

The Acquisitions Committee web page contains only the Serials/Acquisitions glossary and the collection development policies. Should there be more? Suggestions were to add a link to the CRIV page and to the FCLL page. Lorna asked for someone to take over the content of the web page. There is an RSS feed on the TS-SIS web page that is maintained by Martin Wisneski. Anne Robbins volunteered to contact Martin and work on the Acquisitions committee web page.

Lorna has a proposal for an Acquisitions workshop for next year's meeting in New Orleans. It would be intended for an intermediate level audience and would last one full day. The workshop would cover acquisitions in general, methods, vendors, budgeting, collection development and de-selection, differences between acquisitions in law libraries and other libraries, and best practices in acquiring legal materials. Barb Henigman volunteered to help with the proposal that is due August 4 to the TS-SIS Education committee.

Ajaye Bloomstone and Barb Henigman volunteered to work on a proposal for a program on access to vendor viability. Another suggestion was for a program about current developments in e-resource licensing. The question was asked whether it should be a separate program or integrated into the Acquisitions workshop. Jim Mumm suggested that it be proposed both ways for maximum effect. The consensus was to have it as separate program. E-resource management systems and

retooling the acquisitions staff were also suggested. Lisa Arm was interested in a blogging program. Also proposed was a program on new trends in acquisitions.

The meeting was adjourned at 10:00 AM

Submitted by Earlene Kuester
Stetson University College of Law.

Technical Services Special Interest Section
Acquisitions Roundtable

The meeting was called to order on Tuesday, July 11, 2006 at 5:15 PM at America's Center Room 221 by Earlene Kuester.

Attendees: Shyama Agrawal, Lisa Arm, Tom Baker, Ajaye Bloomstone, Marlene Bubrick, Margaret Cianfarini, Emerita Cuesta, Marilyn Este, Bonnie Geldmacher, Jo-Anne Gianmattei, Edward Hart, Gail Hartzell, Trina Holloway, Patty Horvath, Needra Jackson, Angela Jones, Alan Keely, Paul Mastrangelo, Jean Mattimoe, Mary McKee, Wendy Moore, Jim Mumm, Gigi Panagatacos, Sarah Pomerantz, Andrea Rabbia,, Pat Roncevich, Karen Shephard, H.C. Singh, Julie Stauffer, Larry Stillman, June Strojny, Lorna Tang, Mary Tartaglia, Paula Tejeda, Catherine Thomas, Dick Vaughan, Susan von Schrader Claudia Zaher, and Earlene Kuester.

The meeting began at approximately 5:15 p.m. Introduction of attendees was made all around.

A question was raised about West's LMA program and how to keep track of the receipts. This is a program where the library locks in the selected titles for three years and is then given a 12% discount each year. There is no way to track the cost of individual items. Shyama Agrawal said that West deducts 5% off the total amount and then the library is allowed to exchange 5% of the titles the first year. The University of Pittsburgh likes the program and has signed a three-year contract. They have had it for almost a year and are going to review it soon. Part of the discussion considered reasons why West was offering this program. Emma Cuesta said she learned that West is trying to protect its print revenues for a time. The question remains, what happens at the end of the three years?

The question was asked whether libraries are still binding issues when HeinOnline and other online databases are available. Most of the library representatives are still binding at their libraries. Wake Forest has discarded periodicals published before 2000. Duquesne is canceling all of the titles in HeinOnline. It was asked whether Hein would ever offer an archival license for the titles in HeinOnline.

It was brought up that program proposals for next year need to be submitted by August 4. Attendees were asked to share them with the TS-SIS Education Committee and then send them to AMPC. It was suggested to also send them to Rhonda Lawrence, the new chair of the TS-SIS. Lorna Tang and Ajaye Bloomstone have coordinated a proposal for an acquisitions workshop for the 2007 AALL annual conference in New Orleans.

It was asked if anyone had problems with West bundling an appeals court reporter with a higher court reporter. No one else had this problem, but it was suggested that they contact their key account representative.

It was mentioned that West and other publishers often cancel a standing order when an item is returned. A suggestion was made that they ask their representative to send a confirmation email when that happens and also to copy the representative when they email about a return.

Alan Keely mentioned the common problem of indecipherable titles on invoices. The abbreviations used are often confusing and unreadable. It is a good idea to call your representative and complain.

Someone asked if others used the prepaid return labels provided by the publisher or sent unwanted materials back via UPS. It was noted that if you want to be sure the company receives it, use UPS or another vendor where the delivery can be traced.

The meeting was adjourned at 6:15 p.m.

Submitted by Earlene Kuester
Stetson University College of Law

Technical Services Special Interest Section
Cataloging and Classification Committee

The TS-SIS Cataloging and Classification Committee met on July 10, 2006 in St. Louis. More than 70 people were in attendance. The meeting was convened by chair Karen Nuckolls.

The meeting began with a report from Yael Mandelstam, AALL's representative to ALA's Subject Analysis Committee (SAC). The charge of SAC is to "study problems and recommend improvements in patterns, methods, and tools (particularly classification and subject headings systems) for the subject analysis, organization, and retrieval of information resources, and to provide 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." Yael's complete report from the June 2006 ALA annual meeting is available at http://www.aallnet.org/sis/tssis/representatives/2006/2006sac.htm.

Yael continued with a progress report on the activities of the TS-SIS Cataloging Committee's Inherently Legal Subject Headings Project group, which she chairs. The ILSH Project was created to compile a list of legal subject headings; identify ambiguous legal headings; and submit proposals to LC to add "Law and legislation" see references to the authority records of ambiguous legal headings. Yael's report is available online at http://www.aallnet.org/sis/tssis/committees/cataloging/legalheadings/200607report.htm.

Kathy Winzer, who is AALL's representative to ALA's Cataloging and Classification Section: Description and Access (CC: DA), presented her report from the ALA annual meeting. CC:DA is particularly busy this year because of all the work being done on the new cataloging code, *Resource Description and Access* (RDA). Kathy described the process of commenting on RDA as draft portions are made available for comment. Drafts of chapters 6 and 7 were released just prior to the ALA meeting in June. Kathy has been appointed to the "examples committee," charged with providing illustrative examples to accompany the RDA text. Kathy's full report is available online at http://www.aallnet.org/sis/tssis/representatives/2006/ccda2006.htm.

George Prager, AALL's representative to MARBI (Machine-Readable Bibliographic Information Committee) presented his report from the June 2006 ALA annual meeting. His report is available online at http://www.aallnet.org/sis/tssis/representatives/2006/marbi2006.htm. MARBI represents official ALA positions concerning the development of the MARC format. The issues addressed at the June meeting were not specifically law-related, but there were some discussions of general interest, including a discussion paper outlining techniques for the incorporation of former headings into MARC 21 authority records (MARC Discussion paper No. 2006-DP08) to facilitate machine flipping of headings.

Jolande Goldberg, Senior Cataloging Policy Specialist at the Library of Congress, reported on recent developments at that institution. Jolande is serving on a group charged with streamlining and simplifying the classification schedules; she has just begun the process of reviewing all of the K schedules. It is likely that some tables will be simplified as a result of the review process.

Other news from LC

LC's BEAT (Bibliographic Enrichment Advisory Team) team has developed a Cuttering tool, which automatically generates Cutter numbers (in some instances triple digit). Although LC is not considering discontinuing Cuttering, simplifications in Cuttering and application of the Cuttering tool are being studied.

Jolande reported on a recent meeting at LC attended by Beacher Wiggens, during which Mr. Wiggens stated that although there are no plans to "dismantle" the Library of Congress Subject Headings (LCSH) at this time, as yet unspecified changes in application will be made. It is presently unclear which direction these changes will take. Jolande advised catalogers to watch the Cataloging Policy & Support Office (CPSO) website for announcements of policy changes.

The CIP program is not going away, but will be, in the near future, in electronic form only.

LC is planning for the implementation of Unicode characters in bibliographic, authority, and classification records. The classification schedule for Chinese literature will be the first schedule to include both Chinese Unicode characters and English, to be followed by the schedules for Chinese law, Islamic law, and Jewish law.

KBM (Jewish law) and KBP (Islamic law) classification: Jolande has written notes to provide background information

and guidelines on the application of the Jewish law and Islamic law schedules. The title of the document is: "Comparative Development of the Classes for Religious Law: the Abrahamic Tradition - Notes on Design and Suggested Use of the Schedules" and it is available online at http://www.loc.gov/catdir/cpso/KBIntro2.pdf.

By the end of the summer, CPSO plans to have a form online to facilitate the contribution of new classification numbers.

Rhonda Lawrence, incoming chair of the Technical Services Special Interest Section, made a number of announcements concerning the administration of the Cataloging and Classification Committee:

AALL members who wish to be considered members of the TS-SIS Cataloging and Classification Committee are asked to send email to that effect to the incoming chair of the Committee, Jean Pajerek, by Sept. 15, 2006. An email distribution list will be established to facilitate communication among the members of the Committee after the Sept. 15 sign-up deadline.

Rhonda is creating two new advisory groups to help us address important cataloging-related issues in an efficient and timely manner. The two new groups are: the Descriptive Cataloging Policy Advisory Working Group (chaired by Ann Sitkin) and the Classification and Subject Cataloging Policy Advisory Working Group (chair to be determined). Each group will have approximately ten members, as well as several ex-officio members. The groups will work with the AALL representatives to CC:DA and SAC to make both formal and informal recommendations regarding AALL positions on important cataloging and classification issues and policies. (Note: after the St. Louis meeting, volunteers for these groups were solicited via email and members were chosen from among the volunteers.)

Rhonda reminded the group that program proposals for the 2007 New Orleans meeting must be submitted to AALL headquarters by August 15. Proposers seeking TS-SIS sponsorship for their program(s) should "share" their proposal(s) online with members of the TS-SIS Education Committee by August 4, 2006. Not all programs have to be submitted through the Annual Meeting Program Committee; TS-SIS is also able to sponsor programs, but they must be paid for out of TS-SIS funds.

Melody Lembke suggested that practical programs for newer librarians would be useful. The group was reminded that the New Catalogers' Roundtable provides a valuable learning forum for new catalogers.

Jean Pajerek was introduced as the incoming chair of the Committee.

Submitted by Jean Pajerek

Technical Services Special Interest Section
Cataloging & Classification Issues Roundtable

Cataloging and Classification Standing Committee chair Karen Nuckolls opened the meeting, set guidelines for the discussion and suggested some possible topics.

Incoming TS-SIS chair Rhonda Lawrence reminded participants that they will now have to volunteer explicitly to be considered members of the Cataloging and Classification Committee, or to be eligible to be appointed to its subcommittees.

Clara Liao raised the issue of the uncontrolled name headings found in the 970 table of contents fields provided by Blackwell. She asked whether other law libraries were trying to perform authority control on these. Answers varied: one library was attempting to control them as part of a special project initiated by their main university library; one left them in the author index without any control; and one removed them from the main, controlled name index and indexed them in a separate, uncontrolled file of chapter author names.

Yael Mandelstam expressed concern about the quality of the vendor records which law libraries are now commonly loading into their catalogs in large batches. She has discussed this issue with West representatives who gave her the impression that they would be happy to have help from law catalogers in defining standards for these records. She suggested that a working group on vendor-supplied records should be established, and a sheet was passed around to collect names of volunteers.

Discussion continued on two related topics. First, some participants said they were not sure whether the catalog records West is planning to offer for its databases would be for the databases themselves, or for the titles they contain; the consensus of those who have spoken to West was that records will be created for the databases only. Another participant asked whether libraries were still attempting to de-dup records from these large batch loads. Some attendees responded emphatically that

they still are, others that they have entirely given up.

In the context of LC's decision to cease providing controlled access to series titles, Melody Lembke asked how many in the room were NACO participants. Of those participants, many currently contribute only name headings and not series. Participants discussed the possibility of creating a NACO funnel for law, of offering NACO series training at next year's annual meeting, and of encouraging regional groups of libraries to arrange for NACO series training in their own area. Mira Greene offered to coordinate a proposal for a workshop at next year's annual meeting.

Another participant asked whether the CIS records for the Congressional Serial Set have undergone authority control. The answer was that apparently they have not; these records originate from multiple sources and are of unknown quality. It was observed that if the vendor could be convinced to arrange for authority control to be performed on these records before they are distributed that would save each individual library the expense of doing the same work. Alan Keely said he would speak to CIS about this.

Melody Lembke asked for suggestions of topics that could be covered in short half-hour practical sessions at next year's annual meeting, aimed particularly at new law catalogers. Suggestions included: cataloging the Restatements and their many drafts, and classing them separately or together (using Brian Striman's table for classing all the Restatements together at KF395, which a participant promised to try to distribute in electronic form if possible); cataloging printouts from web sites; CDs that come with books; CLE materials; the BNA Tax Management Portfolios; new editions slowly replacing previous ones; replacement volumes in general; and European materials from the European Union, and the Council of Europe.

Clara Liao asked whether libraries are now creating single or multiple records for the same title available in multiple formats. Some libraries are still maintaining a single record; others have moved to multiple records because of the difficulties of maintaining a single record in an environment of frequent batch loading. One library has drawn a distinction between tangible and intangible formats, with print and microfiche on one record and multiple electronic versions on another. Clara also asked whether libraries are providing access to an online continuation of a former print title by adding a URL to the old record rather than by creating a separate record for the online format. Some libraries are making exceptions like this to their regular practice for certain types of publications, such as directories.

Another participant asked how libraries link records which are related only in a local context, such as records for titles which have been digitized as part of the same local project. Other attendees suggested using a local series heading, or adding a 730 field for the name of the local collection.

Submitted by Robert Rendall
Columbia University

Technical Services Special Interest Section
Management Issues Roundtable
Discussion Leader: Karen Nuckolls

Reported by
Karen Nuckolls
University of Kentucky

After participants introduced themselves, Karen requested suggestions for topics of discussion. Eighteen people attended.

Exit interviews

While at the AALL meeting, an attendee received an email resignation from a staff member who had been on the job for only 6 months. This particular position has seen frequent turnover. Are others conducting exit interviews with staff who are leaving?

Several participants noted that their HR departments are charged with conducting exit interviews with staff who are leaving. Some also conduct informal exit interviews, when it seems appropriate.

Note that the questions that HR is asking may in their exit interviews may not be what *you* need to know to identify problems. New questions may need to be used in order to retain staff. HR may only touch on COBRA (Consolidated Omnibus Budget Reconciliation Act) issues, such as health packages, or employee remaining vacation time, or building and office keys. One attendee said that while the Associate Director did conduct exit interviews, she did not share the information with the head of the department. So, the value of such an interview becomes questionable, perhaps due to privacy concerns. There seems to be a fear of being truthful in exit interviews, believing that it could work against one in the future. We need to develop a culture that encourages honest feedback during the exit interview.

Do we look at personality fit when hiring, or just job qualifications

The overwhelming consensus of the group was that personality fit is becoming more and more important in the selection process. Some librarians look at the applicant's personality, and how it will fit with other personalities on staff. One person noted that, during interviews, people are generally on their best behavior. She asked for suggestions for getting to the "real" person beneath the interviewee's façade. Suggested questions included: Tell me something about your last/current job that you really enjoy, and then tell me something that you really dislike. If the person focuses on particular issues, this may be a clue. Also, ask the applicant to describe a situation in which s/he had a conflict in a prior job, and how it was resolved. Ask if s/he was happy with the resolution and why or why not. Ask what they like about the job, and what they don't. Does the answer indicate they may be limiting themselves?

References

Obtaining useful reference checks is becoming challenging. Many HR departments are instructing staff to simply provide dates of employment. One attendee noted that if a reference was happy with an applicant, s/he will let you know that. She interpreted a reference that cited policy to not provide any more information, or referred the caller to the personnel department, as a red flag. Another red flag is not having a current supervisor as a reference. Many attendees said they requested permission from the applicant to contact their current supervisor if they became a final candidate. There are bad supervisors, so this needs to be taken into consideration, but you need to draw out why the applicant does not want that person contacted.

Some attendees reported that they involved all or many staff members in the interview process, including non-professional staff. The more people that talk with the applicant, the more perspectives the search committee has on which to base its decision.

It was recommended that professionals who are job-seeking, should let their directors know they are looking, because directors talk to each other. It's better to let your director know, when possible, than to let him or her find out from another director!

As a result of reorganization, two staff members who do not get along have been put in the same department

Most HR departments are able to suggest things a supervisor can do in such situations, or the HR department itself can meet with the staff members at issue. It can provide mediation, or other tools to help smooth things over. Supervisors can force staff to report to HR for disciplinary action, however the HR department may require documentation in order to start this process. If the behavior interferes with the work that needs to be done, then a supervisor needs to let the staff members know that they don't need to communicate socially, but they do have to do their jobs. If they cannot come to some understanding between themselves, and their performance suffers, then they will be subject to disciplinary action and/or dismissal.

George Washington University has developed a value statement for the library, which includes things like collegiality and cross-departmental cooperation. This document can be pointed to when problems arise, as it is part of the annual evaluation process. A copy of this document will be sent to all the roundtable participants.

General communication and staff relations

Having a safe, secure place and person to vent to, to practice difficult conversations, for role-play, to talk out issues and offer possible solutions, is always a good idea. Whether that person is a sympathetic spouse, or someone in the institution (probably not in the library!), that resource is very helpful toward maintaining sanity.

One attendee had someone who would whine with the assignment of any project. This had become such a problem that the person was placed on probation. The supervisor began emailing the whiner the project information and direction – what needs to be done, how, when, expected results, etc. – with the instruction to please ask if there were questions. The supervisor found that the work got done in record time with minimal whining.

Another attendee had a screamer: a person with whom every conversation deteriorated into a yelling match. She found that communicating with this person via notes in lieu of conversation helped.

Tips on email communication

Don't send an email while angry! Go ahead and write it – it's a good mechanism for venting – but DO NOT HIT SEND! There are very appropriate times to use email; and there are inappropriate times. Avoid using email to address an issue that you would rather not address in person. This is probably a good indication that the issue needs to be addressed in person, and using email is a cowardly approach and will probably cause more harm than good. If you do need to respond to an email which has raised your ire, wait 24 hours before sending it. Also, have someone else read a draft of the message. Remember that email is NOT private. You are creating a digital/paper trail which could come back to haunt you.

Relationships and communications between PS and TS

Can public services edit item and bib records in the online catalog? Most participants responded no. Some allowed public services staff to edit item records, but not bibs. One took the approach of giving the public services staff so many rules for editing records that they gave up on it. Most request that if any changes are "needed," that the staff member print out the record, notate the request, and send it to Cataloging.

University of Kentucky gets the PS and TS staffs together for a meeting, giving each an opportunity to get information on what the other is doing, which creates an awareness of the overall responsibilities of each. George Washington University often invites a PS staff member to the regular TS monthly meetings. Fordham's Director has begun having professional staff meetings where each reports on what they are doing. This has been very helpful. The Boston University PS staff have started a blog, and TS is starting one as well. The two are linked. Helps keep everyone up to date without the challenges of email trails.

How to handle an institutional policy which prevented any negative feedback on evaluations

A suggestion was made that any negatives be addressed as goals instead.

Managing constant change in TS

Everything is changing—the responsibilities, the technology, everything! We are being asked to justify new positions, and filling current positions. How can we be efficient, and yet not lose staff?

Most attendees agreed that any time there is a vacancy, it is a good time to reevaluate staffing, and that this should be viewed as a positive thing. It forces everyone to think about what they are doing, and whether it is the best use of personnel. It is an opportunity to realign responsibilities with interests, which can be a very positive thing for staff.

At Mercer, this evaluation takes place at the HR level. This puts the library in the position of having to vigorously justify filling any vacant position. If the position is a union position, this compounds the challenge.

Just because responsibilities are changing, doesn't mean they are diminishing! For example, the increasing workloads due to the complexities in acquiring and cataloging digital materials in addition to print; learning new workflows and ILS modles for electronic resource management; working with metadata; maintaining the library website; audio/visual support, and so on.

During one reevaluation, an attendee's TS department realized that they really only needed a clerical staff member and didn't really need the paraprofessional staff position they had. They were able to swap the paraprofessional position with a clerical position in PS, benefiting the entire library.

Family Medical Leave Act (FMLA)

One attendee has 3 of 4 staff in various stages of FMLA. One in particular has based the need to take advantage of this resource due to the illness of a family member, and is claiming the need for "light duty."

This is a challenge because a good worker will not tend to abuse the benefits of FMLA. However, if you have a poor worker, this legal umbrella can compound an existing problem. In this regard, the institution's HR department should be able to require that the staff member go to a doctor and get specifics on exactly what kinds of activities are and are not permitted. The supervisor can provide the staff member with a list of job responsibilities to take to the doctor. The supervisor may be able to suggest to the staff member that they need to find some emotional support. Many institutions have Employee Assistance Programs.

The staff member can be alerted to looking into the leave that is provided by FMLA, and not return to work until they are able to substantially perform their job duties.

How to Encourage a staff member to "move on."

This person, if pushed, works well, but otherwise slacks because they really don't want to be working at the library. Start corrective action. If such action has already been taken once, then start it again. Begin to document. Establish a pattern of behavior to support formal action. Remember to stick with work issues.

Paraprofessionals supervising staff in acquisitions or serials

This depends on the size of the library and the budget, but most of the library attendees said they have librarians as supervisors, not paraprofessionals.

Technical Services Special Interest Section
Serials Committee

The meeting was chaired by Carol Avery Nicholson and began with introductions. More people kept arriving and seats were in short supply. Approximately 37 people were in attendance.

We were reminded about the programs and forums sponsored by the Committee. Carol Nicholson asked for any additional announcements. There were none.

The first major item on the agenda was a report on the Exchange of Duplicates program. Copies of the results of the survey taken recently were circulated. It appears that there was more interest this year than before. This year 48 libraries participated in the Exchange. The primary authority title list was updated and a secondary list of titles was added. The Chair asked for feedback on ways to enhance the exchange. Some people like to use the needs and offers electronic discussion list. Jim Mumm asked about the fill rate. It appears to be 99%. He suggested advertising it more and asking those who don't participate for their reasons. Many libraries are still binding and it fills a need for them. Lisa Arm volunteered to prepare a brief survey to gather additional comments and suggestions. It was also suggested that the exchange be done two times per year. Everyone was reminded that the list is up all year and can still be used to request issues. Bonnie Geldmacher, who administers the Exchange, participated in the discussion. The fees go directly to the SIS and a suggestion was made to send the fees generated to the fund for scholarships. Everyone agreed with this and with the suggestion that an article be written for *TSLL* about the Exchange.

The second item on the agenda was a discussion of the ABA questionnaire. Carol is the liaison to the ABA Law Libraries Committee as is Arturo Torres who was also present. A discussion of the definition for counting electronic resources followed. Jim asked for a definition of "owned." Currently, for example, MOML is "owned" because the library has tapes as well as access; Westlaw's titles are not owned and it is counted as one database. The ABA committee will make recommendations in the fall, presumably the ABA Questionnaire Committee will call for comments for some months, and then will make a proposal to the ABA in spring 2007. A discussion followed on whether there would be a standard number of titles for each database. Carol asked if library systems allowed coding of titles to distinguish access vs. ownership. She brought up the issue of multiple formats and that it may be impossible in some online systems to "de-dup" print, micro, and electronic titles. Paula Tejeda said duplicate titles should not be counted. Jim remarked that they could be counted as added copies [if appropriately coded]. Sima Mirkin questioned counting bib records for advance sheets. Carol responded that advance sheets and other parts of a single title should not be counted as separate titles.

No Old Business was discussed.

Ideas for 2007 meeting programs were discussed and coordinators were asked to volunteer:
- Statistics & Expenditures: Paula Tejeda and Joe Hinger
- Cataloging Internet Resources: Keiko Okuhara
- Blogs for Technical Services: Lisa Arm

Other ideas:
- Cataloging standards
- Serials cataloging
- Impact of changes in collection development for serials
- Impact of electronic resources on serials management

The meeting was adjourned at 8:45 a.m.

Submitted by Alice Pidgeon

OBS-SIS & TS-SIS
Joint Research Roundtable

Reported by Chris Long
Indiana University School of Law-Indianapolis

Chris Long commenced the roundtable discussion at 9:00 a.m. on Tuesday, July 11. After the attendees introduced themselves, Chris introduced Paul Healey, editorial director of *AALL Spectrum*.

Paul began an informal discussion by commenting on the dearth of technical services writing in the profession. He remarked that more technical services writing for public services librarians is needed. He noted, though, that there is often a schism between public services and technical services writing because public services librarians do not always have a good understanding of tech services work. Technical services librarians, therefore, have two potential audiences when contemplating an article. One audience is fellow tech services librarians, who know the issues but are in some ways a limited audience. Paul encouraged tech services writers, though, to write for a more general audience so that the rest of the world knows what we are doing and can benefit more from our work.

Paul then provided the roundtable participants with several tips. He mentioned that one misconception that writers often have is that they believe they must have a fully finished article before they submit it to an editor. Paul said that involving the editor early in the writing process allows for more cooperation between writer and editor that will ultimately produce a better work. Paul pointed out that there are many kinds of publishing opportunities available, ranging from newsletters to scholarly publications, book chapters, and book reviews. Paul also urged writers to keep in mind that your goal is to make your article accessible and understandable. To that end, writers should have in mind what their central thesis is and develop an outline for the article so that their main points do not get lost in a mass of detail. Paul cautioned writers that humor and gimmicks are best avoided in professional writing.

During the course of the roundtable, Brian Striman dropped by to let the roundtable attendees know that he is looking for guest columnists for *TSLL*.

During the question and answer time, Hollie White pointed out that it is often hard to know what a public services librarian wants to know about technical services subjects. Paul responded that public services librarians will be interested in topics that affect them. He also suggested that people are always interested in coming change, and it seems that there is currently a lot of that going on in tech services work. He also said that writing about something in your job that excites you and is a joy is interesting to a lot of people and would make a good article.

Two other topics were discussed. One concerned what major obstacles you face as a writer. The other was about open-access journals.

At the end of the discussions, Chris Long distributed handouts on publishing opportunities for tech services librarians and some selected sources of available research grants.

RLIN/OCLC Merger Meeting

Reported by Ming Lu
Los Angeles County Law Library
Co-chair, OCLC/RLIN Committee

The RLIN/OCLC merger meeting was held on July 9, 2006 at the AALL annual conference in St. Louis. The merger meeting lasted for one and a half hours. There were around fifty people from both RLIN and OCLC user groups in attendance. Glenn Patton, the director of WorldCat Quality Management Division at OCLC, gave a presentation on combining OCLC and RLG. Currently, Glenn is working on the OCLC/RLIN Technical Service Transition Team.

RLIN and OCLC are the two biggest databases for library bibliographical information. Last May, when the merger of RLIN and OCLC was announced, many concerns were raised, especially from RLIN users. During the past two months, we have all been eagerly awaiting more information about this merger. The 2006 AALL conference provided a great opportunity for us to engage in discussion.

At the beginning of the presentation, Glenn briefly outlined the current state of the merger. There are two important components of the merger. The first is the creation of RLG-Programs: Effective July 1, 2006, RLG became a new division

of OCLC Programs and Research. The second is the integration of RLG's online products and services with OCLC products and services. Glenn then explained why, when, and how the merge would be completed. He also discussed some issues of concern, including the RLG-Programs agenda, digital databases, Eureka databases, RedLightGreen, resource sharing, and the RLG union catalog.

Glenn's presentation was followed by a question and answer time. Another RLIN committee meeting was held on July 12, 2006. Glenn was also present at that meeting.

CONELL 2006:
Observations and Comments

Annie Chen
Acquisitions Librarian
Stanford University Robert Crown Law Library

I had a great time at this year's CONELL (Conference of Newer Law Librarians). What a brilliant way of connecting oneself to the world of law librarianship, both professionally and personally!

As a new acquisitions librarian, I was very excited to be offered the opportunity to attend the annual meeting of AALL this summer. However, I was a little bit nervous about the size and scale of the meeting once I received the preliminary program booklet. It was quite overwhelming for a first-timer. I felt like a new student on campus again.

Then I heard about CONELL, an event held every year at the AALL Annual Meeting. It's a program specially put together for newer members and scheduled the day before the Annual Meeting. For me, it looked like a perfect prelude to the much larger gathering at the AALL annual meeting itself. TS-SIS even offers a special CONELL grant. I sent in my application and was lucky enough to receive a TS-SIS grant to attend the St. Louis CONELL.

Check-in with continental breakfast was scheduled for 7:30am, and then the program began at 8:00. The first session consisted of welcome messages and remarks from the president, board members, and other leaders of AALL. I was touched by their experiences, their passion for the profession, and their enthusiasm for new members. They all started as rookies, and with persistence and commitment they became proud veterans. It is their involvement, participation, and contributions that make AALL such a special organization through which all its members can learn, grow, and foster connections.

The second session was an interesting one. We were divided into three groups and each group participated in three activities. The first was "Ask the Experts," which offered opportunities to ask questions and talk to veteran librarians face-to-face about their expertise. There were sample questions kindly prepared for us to begin a conversation with them (how thoughtful). From professional development to acquisition of electronic resources, I gained so much valuable advice and lots of great ideas. Like teachers, these "experts" were experienced and knowledgeable. Like counselors, they were patient and understanding. They made us "newer" librarian not so new any more!

The second activity was "Marketplace," where information tables were set up so that we could meet representatives from AALL committees, special interest sections, and chapters. We walked around and collected information on how to get involved. It was a wonderful opportunity to explore and get to know the Association through a group of devoted members. I was truly impressed by the number and the variety of Marketplace participants. It was so nice to discover that we have these many choices for our interests and professional needs.

The third was a fun activity, "Speed Networking." We were put into pairs and tried to get to know each other within a short period of time. It was in this game-like setting that I met Sandy, with whom I later became good friends. After a couple practice rounds, I learned how to introduce myself and how to build an initial connection very quickly— a people skill that I have always been lacking. I think not only kids can learn from playing games, we can too!

We had a lunch break after we finished all three activities. Then a guided tour of St. Louis was arranged and we were able to spend the whole afternoon touring the city. By the time I returned to the hotel, I had made quite a few acquaintances, had some background information on the conference, and most of all, had a lot of fun. I knew what to expect the next day and was ready to attend the meeting, with some friends accompanying me. CONELL was a good warm-up plan for me and I really appreciated it!

My First AALL Experience

Donna C. Movsovich
Catalog Librarian
Syracuse University College of Law
H. Douglas Barclay Law Library

Arriving in St. Louis, I felt excited and nervous. I have been the cataloger for Syracuse University's H. Douglas Law Library for only a few short months and this was my first AALL conference. I kept wondering how I would fit in with so many "experienced" law librarians from all over the nation.

My first opportunity to meet another conference attendee was in an airport transport van on the way to my hotel. I sat down next to an "experienced" librarian in my area of specialty! Soon we were discussing relevant cataloging topics. "Have you read the Calhoun report yet?" "What do you think of the LC decision?" My nervousness calmed and my excitement grew as he made me feel comfortable and welcomed. I would later encounter this person at several committee meetings. His parting words to me were, "I may not know the answers, but I know the people who know the answers!"

Saturday, I attended CONELL (Conference of Newer Law Librarians). My director, Tom French, encourages all "newbies" to attend. The people he met when he attended CONELL became lifelong colleagues and friends and since he valued his experience, he believed the day would be valuable to us. The morning consisted of meeting other "newbies" and becoming more familiar with the structure of AALL. We had a chance to question the experts and participate in a small exhibit hall. I loved the energetic pep talk given by Cornell Winston. His advice included five goals for this year's conference; 1). Meet five people every day, 2). Attend a program or meeting outside your comfort zone, 3). Give out business cards and collect free stuff at the exhibit hall, 4). Do something fun!, and 5). Find opportunities for ribbons. His words were with me all through the rest of the conference. Although I may not have achieved all five this year, these goals could certainly be applied to future AALL conferences. Attending the CONELL conference gave me the confidence to maneuver the "big" conference.

The next days, I was very busy attending workshops, plenary sessions, committee meetings, and making several trips to the exhibit hall. The West and LexisNexis parties were a grand display! Every day I met people and even accepted invitations to lunch and dinner. It was a whirlwind of education, work, and fun.

My conference schedule focused on cataloging. In the workshops I learned about the upcoming changes in cataloging, such as RDA (Resource Description Access), and FRBR (Functional Requirements for Bibliographic Records). These sessions were educational but I received the most helpful information in the cataloging committee meetings. The "experienced" catalogers were sensitive to the "new" catalogers. During these meetings the basics were explained as well as pertinent issues discussed. I found out that catalogers can be passionate!

What impressed me the most about this conference were the attendees. Everyone I met was helpful in making my first AALL conference a success! Thank you to all of you.

Program Report

Preservation of Digital Information: Global Trends in Digital and Analog Archiving, AALL Program A-4

Reported by Deborah Dennison
Head of Bibliographic Access
Case Western Reserve University
Judge Ben C. Green Law Library

"The electronic version of the Doomsday Book compiled in England in 1086 has become unreadable in 16 years while the original 900 year old analog version remains readable" – Russel Burkel, Digital Amnesia

Given its objectives, to address digital format preservation challenges as well as inform the audience about alternative preservation programs, this program was highly informative. The program coordinator and moderator was Terrence McCormack, SUNY-Buffalo. One highlight for me was gleaning a greater understanding of and respect for the Law Library Microform Consortium (LLMC) and its mission, the cornerstone of which is the long-term preservation of legal information.

Increasingly, researchers expect full-text electronic resources. Quite naturally, observing this growing trend, library administrators heartily encourage librarians to provide such access. Thus, we scramble with the necessary software applications and attendant licensing, vendor, and copyright agreements to accomplish this. Simultaneous to these efforts, new technology undergoes constant development and change. These conditions impose the dilemma that as new technology develops, previous platforms may no longer "work." In other cases, such as with web applications, URLs may not be

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maintained so that previous information is no longer available. Ultimately, in the midst of the well-intentioned impetus to provide digital content, long-term preservation issues are not equally addressed. This program successfully heightened the audience's awareness of such concerns.

In keeping with AALL's underlying global legal information theme, the first two speakers addressed methods of preserving digital legal information in Europe, specifically "construction of a renewable data infrastructure that preserves data through migration and software emulation." Informative as he was, the first speaker (Pascal Petitcollot, General Secretariat of the French Government) would have been better suited for a smaller audience group; I had difficulty hearing at times. However, I would recommend perusing Petitcollot's short article, "Preservation of legal information in Europe," for a good outline of key issues, which can be found in the 2006 AALL program handouts. Central to the discussion is authenticity. As Petitcollot points out, "the producers of the official texts are in the best position to preserve legal data for the long term." The next speaker, Stephan Cottin (Constitutional Council of France), addressed legal and technical requirements involved in archiving legal electronic legislative data. Governance for electronic versions of legislative materials specifies permanent, free, online access (i.e., not just archived, but maintained online). His discussion was laced throughout with references to the all-important "best-practice" models.

The next speaker, Russell Burkel (Analogue Imaging LLC), elaborated on the dire need for better preservation initiatives in digital technology. As an illustration of this need, he presented the dramatic example placed at the top of this review about the Doomsday Book. Burkel reinforced the thought that we are indeed providing "short-term access," but sorely lacking "long-term" preservation. Why is this? Simply put, "users are not demanding a solution." That's unfortunate, especially since a solution might be as simple as merging existing technologies. Burkel sequed into the next speaker's turf (Jerry Dupont of LLMC) with a discussion of LLMC's work to OCR scanned analog film, said to be 99.5% accurate. Burkel, elaborating on his premise of merging existing technologies, proposed a model utilizing OCR-B font capable of delivering 100% accuracy.

Lastly, Jerry Dupont gave an engaging presentation focusing on initiatives within LLMC's mission to preserve legal information. Although no one prefers to read microform, the media offers many advantages in terms of storage – not the least of which is a shelf life of 500 years. Dupont said that LLMC intends to continue its mission as long as the impermanence of digital technology remains an issue. That being said, LLMC continues exploring ways to merge microform technology with digital initiatives, as well as working with groups to designate repositories of print collections. For work on the latter, look to AALL's Legal Information Preservation Alliance (LIPA).

Program Report

Pioneering the Transformation of Technical Services Librarians into Digital Librarians, AALL Program A-5

Reported by Georgia Chadwick
Law Library of Louisiana,
Louisiana Supreme Court

It is a great benefit for law librarians to learn from leaders outside of law librarianship as many of the same principles apply. Carol Hixson, of the University of Oregon, discussed how her former traditional Catalog Department was transformed into the Metadata and Digital Library Services Department. The many changes in the department required staff to absorb new responsibilities and to learn many new skills. Ms. Hixson said her mantra is: "Cataloging is a public service." This dedication to providing excellent public service combined with a willingness to change and take risks are the foundations that enabled the department to enhance the services provided.

Ms. Hixson stressed that while there is no magic formula for change, technical services people already have the skills that can transform them. The staff needs to be open to learning and to suggest new approaches to accomplishing the work of the department. Increasingly, vendor-supplied records are used and different levels of cataloging are now accepted. The Dublin Core concepts are taught. The staff has regular meetings to discuss various new procedures and work flow— and a cardinal rule is that if someone raises a problem they must also suggest a solution. A threshold is established for productivity and when that level of output is reached, the time saved is used for staff to learn new skills to enable them to meet the ever-increasing challenges. Team members who receive special training share what they learn with others in their team.

The catalog department had started off organized along a team structure, but the transformation of the department is now best described as a series of overlapping circles. Team leaders participate in departmental management and policy decisions, and also serve as primary resource persons for members of their teams. Team members have a primary focus and area of expertise but also routinely work on special projects led by team leaders outside their team. Ms. Hixson mentioned several times that the staff is having fun, as this arrangement allows them to work on new projects with new people.

Ms. Hixson referred the audience to the University of Oregon Libraries' website which contains a detailed description of how the Metadata and Digital Library Services department assists members of the University of Oregon community with organizing collections of materials and making them more widely available. An example of a project, which involved the application of metadata to a collection of photographs, was shown. The department used funding from a grant involving a local tribe of Native Americans.

The transformation of the cataloging department into its greatly expanded role in the library's structure was of great value. Ms. Hixon's presentation covered all the details of how the department made the transformation, but overall she said they made the change by welcoming new responsibilities, and taking chances on trying new approaches to new problems.

Program Report

E-Life Cycle Management: A Town Meeting with Public Printer Bruce James and U.S. Archivist Allen Weinstein, AALL Program G-1

Reported by Michele Pope
Loyola University College of Law-New Orleans

GPO is changing from a print-centric to a content-centric model. Users will be able to receive that content in the format or delivery channel they desire. Titles available on GPO Access have often been a byproduct of the printing process but all this is about to change. GPO will employ an integrated system to manage digital content, and print products will be one of many delivery options.

The Future Digital System (FDsys) will encompass GPO business information, content management and digital production. While FDsys will handle digital content, it will be integrated with GPO's ILS, which will continue to describe and locate all in-scope publications, whether tangible or digital. GPO's Program Management Office has been busy giving presentations to communicate the purpose of FDsys, as well as to receive comments and refine requirements for the system. GPO evaluated the proposals received in response to its RFP issued on April 4, and a contract was to be awarded at the end of July. Want a closer look?— at http://www.gpo.gov/projects/fdsys.htm or http://www.access.gpo.gov/su_docs/fdlp/pubs/proceedings/06spring/dayinfdsys.pdf.

An automated harvesting pilot project of the EPA website is underway to learn about automated discovery, assessment, and harvesting of web publications within the scope of GPO's dissemination program. The results of the pilot will be used in the development of the overall harvesting solution that will be implemented in conjunction with FDsys. Currently the assessment has revealed a 50% error rate in finding publications within scope, meaning half the publications harvested are not within scope. Although this rate is high, GPO will use these errors to reconfigure the rules governing the harvesting during the second of three crawls to take place during the pilot. By September 2006, GPO will be working on incorporating the harvested content into the Federal Depository Library Program (FDLP).

Other GPO Activities

Public Printer Bruce James, Archivist for the United States Allen Weinstein, and Superintendent of Documents Judith Russell attended the meeting to give updates on new and current initiatives. Bruce James is reported to be retiring at the end of this year.

GPO is continuing to develop its plan for digitizing a complete legacy collection of tangible U.S. government documents, including the Serial Set, and will soon be embarking on a six-month demonstration project.

The enhanced *Catalog of U.S. Government Publications* was launched in March 2006. This is the OPAC module of GPO's new ILS.

The FDLP manuals are being updated and consolidated into a single online publication. Members of the depository library community wrote fifteen chapters of the new *Federal Depository Library Handbook*, due in a final version by October 2006.

About 95% of government documents are born digital. Tips to effectively transition to a more online depository library collection are available at http://www.access.gpo.gov/su_docs/fdlp/coll-dev/online_coll_tips.pdf.

GPO released its RFP on April 12, 2006 for innovative partnerships with the private sector to create new business models and improve services for the Sales Program, FDLP business practices, International Exchange Service libraries and By-Law

recipients. During the first five months of FY 2006, GPO distributed a total of 3,802,436 tangible copies of 7,258 titles, which is an increase of 365,081 copies and 536 titles compared to the same period in FY 2005. Through June of this year, 8,166 bibliographic records and 6,000 PURLS have been created.

By the end of this fiscal year GPO expects to procure a cataloging service to work on its backlog of pre-1976 material.

National Archives and Records Administration (NARA) Update

In this context, ERA stands for, not the Equal Rights Amendment, but the Electronic Records Archives. NARA is currently embarking on a preservation initiative that they have been researching since 1998. Partners include the San Diego Supercomputer Center, University of Maryland Institute for Advanced Computer Studies, National Center for Supercomputing Applications at the University of Illinois, Georgia Tech Research Institute, and many federal agencies. Lockheed Martin Corporation will build ERA with the help of an advisory committee made up of experts in information science, computer science, records management, information technology, archival science, law, history, genealogy and education.

ERA will be able to evolve over time. Text documents, emails, web pages, digital images, videotapes, maps, spreadsheets, presentations, audio files, charts, drawings, databases, satellite imagery, and geographic information systems all are made with software and hardware that often becomes obsolete. ERA will need to free the record from dependence on the programs used to create it, and allow it to be accessed with whatever programs are in use in the future.

Program Report

**Pioneering Toward a New Cataloging Code—
RDA: Resource Description and Access, AALL Program G-3**

Reported by
Margaret B. Perrin, Cataloger
New York Law School

Kathy Winzer, Catalog Librarian, Stanford University Law School, and AALL representative to CC:DA, introduced the program and the speakers. This session provided an overview and report by Jennifer Bowen on the work of the Joint Steering Committee (JSC) and a close analysis by Ann Sitkin of selected RDA sections of the new code as it existed in July. The pairing of background and context with critical analysis was very valuable for the audience of catalogers and others struggling to understand where the revision process was heading and wondering when the new code might be completed.

A New Cataloging Standard for a Digital Future— Jennifer Bowen

Jennifer Bowen is Head of Cataloging at the University of Rochester, Head of Technical Services at the Eastman School of Music, and ALA representative to the Joint Steering Committee for Revision of AACR (JSC/RDA).

Jennifer Bowen addressed four topics: why a new standard was being developed, what were the goals of RDA, what is the content of RDA, and what are the issues in developing the RDA code. When she clicked on the second image of her slide presentation, we saw this nifty, but antique 1978 Cutlass Supreme automobile and the caption read "1978—when this car and AACR2 were new," the audience got the picture. Like modes of automobile travel since 1978, cataloging had changed, too. Jennifer explained that a new code was needed to describe and provide access to an increasingly broadening range of material to be cataloged: from the familiar hardcopy books and serials and microform reproductions to nonprint resources like compact discs, electronic journals and databases, and digitized titles. Such a code would have to be up to date, compliant, cost effective, adaptable, and attractive to the new generation of catalogers.

The JSC, Jennifer Bowen said, envisioned RDA as this new standard for resource description and access. It is designed for a digitized environment. It is being developed as a web-based product (although print versions will be available); it will be a tool to describe and provide access to all digital resources as well as analog ones; and the resulting records will be usable in the digital environment. Its developers believe that it will work in the current cataloging environment and that it will accommodate the expanding needs of cataloging in the future. The RDA development group is composed of six constituencies from the U.S., Canada, the U.K., and Australia. Jennifer Bowen reminded us that their work depended on the same international collaboration, cooperation, and compromise that characterized the effort that gave us AACR a quarter of a century earlier.

The goal of RDA will be a multinational content standard. Although developed for use in the English-speaking environment, it will be usable in other language communities. RDA will be independent of format (e.g., MARC21) and, therefore, usable with other metadata schemas. RDA will also support the basic FRBR (Functional Requirements for Bibliographic Records)

user tasks outlined in the IFLA (International Federation of Library Associations and Institutions) conceptual model: to find, to identify, to select, to obtain.

At the moment, RDA is basically a work in progress. The original version, after all, was to be AACR3. Jennifer acknowledged that the reaction and many responses to that first version led to rethinking, rewriting, and, ultimately, to create RDA as a new document. That process continues. As each part is made available for review and comment at six-month intervals, it is shared via lists, discussed, and criticized. Jennifer assured the audience that the JSC hears us.

The current two-part structure of RDA is subdivided into three sections: description, relationships, and access control. The first two sections address bibliographic record responsibilities; the last section addresses authority record responsibilities. The separation of functions reflects the tasks and relationships of FRBR entities. In this new structure, AACR's heading, main entry, added entry, and uniform title have become RDA's access point, primary access point, secondary access point, and citation. (Use of the term *citation* has caused consternation among law catalogers, for whom the term has a specific legal definition and application.) The last RDA part will cover authority control functions: authorized and variant forms of names, corporate bodies, places, and citations (uniform titles) for works and expressions. The proposed RDA timeline projects a completion date for a first release in mid-2008.

Developing the new code involved facing a number of what Jennifer Bowen called "big issues." The first, about "continuity and change," resulted in the JSC decision not to discard AACR in its entirety and start from scratch. The JSC saw AACR's 25 years of thought, practice, continuing revisions, and numerous agreements among the four constituent countries as invaluable. The JSC decided to build on that foundation. Their goal was that RDA catalog records would be able to coexist with AACR records.

Another JSC decision was to develop RDA as a content standard and not a display standard. RDA will allow us to move beyond the restrictions of ISBD punctuation, and into areas to reorder and reorganize record elements.

The JSC also reassessed the importance of transcribing data as it is seen on the resource. This approach simplifies description. Catalogers will describe what they see; inaccuracies can be accounted for and corrected in other parts of the record.

Still another major issue, one in draft framework at the time of the conference, is the development of adequate data elements to describe content and carrier. This issue is being addressed in a joint effort between JSC/RDA and the developers of ONIX, an international standard for representing publishing information in electronic form.

Work continues on a number of other issues as well, including mode of issuance and guidelines for the treatment of treaties (the title main-entry issue). Successful resolution of all these issues is vital.

Review and Analysis— Ann Sitkin

Before beginning her part of the program, Ann Sitkin said a few words as one of its coordinators. She expressed great appreciation to Jennifer Bowen for her work on the JSC and particularly for coming to AALL to participate in today's program. Ann then thanked Kathy Winzer and Regina Wallen, Assistant Director for Technical Services at Stanford University Law School, for working with her to put the program together.

Ann Sitkin is Cataloging Services Librarian, Harvard Law School Library, and former AALL representative to the ALA Committee on Classification and Cataloging: Description and Access (CC:DA).

Ann agreed that RDA is very much a work in progress. Since Jennifer Bowen had dealt with its structure, Ann would give us a brief idea of the style of the document and have us take a closer look at some of the legal rules as they are now written. She called our attention to some of the objectives and principles of RDA: consistency in formulation, clarity, "generalization" (i.e., providing substantive instructions), and non-redundancy. These form the basis for what we see in the document, and Ann suggested that we keep them in mind as we consider the draft.

First, Ann reminded us that law catalogers had tried to avoid some of the problems we see in today's document. Right after AALL 2005, she recalled for us, a number of catalogers who formed a small working group that developed recommendations for dealing with the idiosyncrasies of the legal rules, for example, court reports, and treaties. The recommendations were duly forwarded to the JSC.

Then, following her slide presentation as an outline, Ann commented on the rules, some briefly and others more fully. Chapter 6 refers to relationships among resources, including those for art, music, and law (6.13). These are straightforward. Ann mentioned, however, that CC:DA thought the special rules here for art, music, and law might be better dealt with in examples and illustrations. Kathy Winzer is working with a group on this issue.

The rules in Chapter 7 describe how to choose primary and other access points for persons, families, and corporate bodies associated with a resource and include special rules for musical works, art works, and legal works. This chapter deals with the material contained in AACR, Chapter 21. Ann called our attention to the marked change in language here and throughout from AACR's familiar main entry and added entry to primary access point and additional access point. We also see greater leeway in assigning additional access points: the "rule of three" is relaxed or absent. We should note, too, that there are no rules for works of mixed responsibility. Ann believes that this situation will need to be revisited by the drafters.

Sections 7.9.0 through 7.9.7 contain additional instructions for legal works: general guidelines; laws, etc.; administrative regulations; court rules; constitutions, charters, etc.; treaties, etc.; law reports, citations, digests, etc.; court proceedings, etc. The scattering of rules and instructions for a particular topic in various parts of RDA is one of its most frustrating aspects. Another is the inadequate number of examples. Ann particularly compared the language of AACR2 21.31B1 with that of RDA 7.9.1.1--Laws governing one jurisdiction--noting that the familiar text has changed dramatically. Attention to uniform titles has disappeared. Constitutions have been consigned to a parenthetical note. The direction to "enter under ..." has been replaced by the bland "provide additional access points." Ann was especially concerned that in law reports, citations, digests, etc. (7.9.6) the code confuses catalogers with an either/or choice of entry, rather than directing them to the best choice. This section needs guidelines.

Referring to the effort in 2005 by law catalogers to communicate with the JSC about the legal rules, Ann expressed frustration with RDA's handling of court reports. The catalogers had urged that the main access point for reports of a single court should be for the court, whether or not the reports were issued by authority of the court, and that additional access points be provided for the reporter and publisher. RDA's wording (7.9.6) offers alternatives that include access by reporter or title.

Another area for which the law catalogers tried to give recommendations was for the treatment of treaties, etc. (7.9.5). They offered suggestions for simplifying this section, but thought the distinction between bilateral and multilateral treaties should be retained. They recommended that bilateral treaties be entered under the first heading in English alphabetical order and that multilateral treaties be entered under the uniform title for the treaty. Ann said that it seemed as though the drafters themselves might not have been in total agreement and that they simplified the language somewhat but left the text unchanged. In 7.9.5.2, however, for treaties between four or more governments, RDA tells us to use the title as the primary access point. What title?—either title proper or "preferred" title. But what is a "preferred" title? A brand new term has been introduced, yet with no definition provided. Does "preferred" refer to the old uniform title, a popular title, a citation title, or some other title? RDA is unclear and confusing.

Shortly after these chapters were drafted, the Library of Congress itself submitted a proposed revision for treaties, etc., to address the difficulty of English alphabetic order in an international setting. They proposed that RDA eliminate the distinction between bilateral and multilateral treaties and enter treaties under the title proper or that mysterious "preferred" title. This late recommendation further confused the situation. Now the chapter still needs more specific rules for treaties and more examples. It also needs a definition of what constitutes a "preferred" title.

Ann finished her overview and said that she hoped she had succeeded in showing us how the rules were changing and where we still need to address issues. She stressed that it was important that we send our recommendations to Kathy for forwarding to the drafters of RDA.

Questions/Comments

Members of the audience took full advantage of the opportunity to speak, and their comments greatly enriched this presentation.

First, both Jennifer Bowen and Kathy Winzer encouraged everyone to study the drafts on the RDA website at http://www. collectionscanada.ca/jsc/rda.html and to comment formally to CC:DA. There is a form on the RDA website, but Kathy further encouraged us to forward comments to her as the AALL representative to CC:DA so that, where we all agreed on points, she could offer the comments as representative of the opinions of a group, which might make a greater impression on the JSC.

Rhonda Lawrence, Head of Cataloging at UCLA Law and Chair of TS-SIS, made a number of comments. She asked Kathy to have the various URLs that were mentioned during the session posted on the Technical Services SIS website. Rhonda also asked Kathy to identify herself and describe for the audience her very important role as CC:DA representative. When Rhonda referred again to the failure of RDA to consider the law community's concerns about the legal rules, Jennifer Bowen suggested resubmitting the request, with documentation. Rhonda also talked about the "tension" of creating a print version for what is basically a digitized document, and Jennifer reminded all about the financial and labor expense of creating and maintaining print documents. In response to a show of hands in favor of a print document, Jennifer said she would carry

that "vote" back to the JSC.

Marie Whited, Library of Congress, struggled to control her great disappointment with Chapters 6 and 7. She believed that the working group of last summer had prepared good recommendations for RDA and that their product now seemed to be going backwards. For her, treaties were either bilateral or multilateral. "Two or three" or "four or more" governments— "Forget it." She pointed out the difficulty for catalogers generally to make the kinds of decisions the new rules would necessitate—for treaties, reporters, and citations—and begged Jennifer to "please listen to us" and make the rules easier. Jennifer Bowen responded that that is what the JSC was trying to do and urged us to take this opportunity to raise important issues again.

Melody Lembke, Technical Services Librarian at Los Angeles County Law Library, talked about the difficulty handling court reporters and why it was important to use the court as the primary entry.

Margaret Leary, Director of the University of Michigan Law Library, commended the committee members for their valuable work. She supported the calls for simplification of the rules and language; she emphasized the importance of reporters as sources of law and as written by legislators and the courts, but not by reporters. As a director, she was concerned about the increasing costs of cataloging and about how important it was to have clear, uncomplicated rules so that material could get to the shelves quickly. She also added a pitch for public services staff, hoping that the JSC was hearing from those who deal with patrons as they are doing legal research and using the catalog.

Carol Avery Nicholson, Assistant Director for Bibliographic and Collection Services at UNC, supported Margaret's call for attention to the users.

Additional comments were offered about the idea of issuance and state codes and about the concept of internationalization and whether other countries were being included in the development of RDA. Jennifer Bowen said that the JSC was trying to facilitate that broad cooperation, although it was difficult to work with large numbers of countries. She indicated that the JSC hoped to standardize the code for greater international use.

Resource Information

Kathy Winzer, AALL representative to the ALA Committee on Cataloging: Description and Access (CC:DA).

JSC Public Website site: http://www.collectionscanada.ca/jsc/

RDA Online prototype and survey: http://www.rdaonline.org. Jennifer Bowen encouraged everyone to try RDA in the format for which it is intended. A user survey follows any one of the demos available.

TS-SIS website: http://www.aallnet.org/sis/tssis

Program Report

Counting Electronic Resources: Should We Count Them, and If So, What Do We Count?, AALL Program J-5

Reported by
Alice Pidgeon
Pace University

Kim Clarke and Christopher Simoni debated whether we should count electronic resources. On one side we need to justify expenditures by reporting counts of electronic resources and on the other, practices differ from library to library making counting not very useful, particularly for any realistic comparison statistics.

Questions that arose included; 1). Should we count titles once or multiple times? Library systems don't de-dup multiple titles. Is the is the best use of staff resources? Not de-duping is bad, but until there is a way to do it, it will be bad data, 2). Access or ownership? If paid for, it should be counted, 3). Main library databases: should we include them in our counts? No, because that would lead to double counting by institution. Yes, we should include only the titles the law library would have purchased; where do we draw the line?, and 3). Should aggregators be treated as one title? We really should have additional access points and be reported as different titles. An example was given by Richard Amelung (St. Louis Law Library) of Marcive loaded titles being counted separately.

Program Report

Do my Statistics Say What I Want Them to Say?
AALL Program L-3

Reported by
Alice Pidgeon
Pace University

Two law firm librarians compared the way that they compile and present statistics to their managing partners. Carol Bannen presents comprehensive monthly reports concerning research staff contacts with individuals, billable time using Elite billing software, InterLibrary Loans and trips by messengers, Lexis and Westlaw billing averages, new titles, new routings and filing, how many hits for the virtual library, client services, projects, staffing changes, emails with anecdotal compliments on work performed, and of course, budget reports. She uses it to justify added staff and to help in writing the annual report.

Virginia Smith reported that she kept very simple statistics by making tick marks. In her firm, there is little demand for high levels of detail but she does keep many of the same counts as Carol: how many attorneys were helped, how many books were added, and other reports. She acknowledged that it did help getting additional staff, and in training.

The audience asked about comparing statistics with other firms. They use benchmarking surveys. Another question concerned tables. Carol responded that they use Verbiage for that task. There was another question about keeping track of "time written off," but no replies as to how that was handled, other than just raw numbers.

Program Report

Cataloging at the Crossroads: LC's Series Decision and Its New Role in National Cataloging Policy
TS-SIS Program, Moderated by Rhonda K. Lawrence

Reported by
Brian Provenzale
UCLA Law Library

"May you live in interesting times" is a saying that springs readily to mind lately when thinking of cataloging as a profession. Whether you believe the saying is a blessing or a curse, there is no denying that now is an interesting time to be a cataloger, with no shortage of hot-button topics to discuss— RDA, the "Calhoun" report, the "Google-ization" of everything, and a host of other complexities and changes. In the "Cataloging at the Crossroads" session, the Library of Congress' decision to discontinue series authority control took center stage, sparking a lively conversation among attendees.

In the first half of the session, several principals in the law cataloging community spoke in turn to express their professional positions and reactions to the decision. The program's second half was an open forum for questions and commentary, culminating in the establishment of an ad-hoc task group to study controlled series access.

In their capacity as employees of the Library of Congress (LC), Marie Whited and Jolande Goldberg offered some official background. Whited began by discussing the series decision as it applies to the Law Library of Congress (LLoC) where she is Catalog Liaison. She reminded the group that LLoC does not do its own cataloging; it all comes from the cataloging department at the Library of Congress. However, she added that LLoC has asked for and received exceptions for continuing authority work for certain series. One such example is the Documentary History of the Supreme Court, which is classed together and fully analyzed.

To provide further perspective and illustrate the firmness of the decision, Jolande Goldberg of LC's Cataloging Policy and Support Office relayed the Library's official position that its catalogers are required to strictly follow the series authority mandate. Acting otherwise, she added, would amount to insubordination, despite any personal reservations anyone may or may not have.

Glenn Patton, Director of WorldCat Quality Management at OCLC was asked to speak next about his organization's new policy on controlled series access. He summarized the statement issued on June 5 by OCLC, which may be read in full at http://www.oclc.org/news/announcements/announcement191.htm.

The key components of the statement are; 1). OCLC will not allow records with traced series to be overlaid by LC records, 2). OCLC has changed the priorities of PCC records so that they now take precedence over LC records, 3). OCLC staff in the Quality Control Section will continue their practice of responding to libraries' requests to make changes in series treatment in master records. This can, as needed, include creating and maintaining series authority records related to the bibliographic records being updated, and 4). OCLC staff in the Cataloging In Publication Upgrade Unit (at Blackwell's

Book Services) are NACO participants and will continue to verify series information and will, as necessary, change LC records to reflect appropriate controlled series access.

Beyond reiterating the OCLC statement, Mr. Patton announced that the Cataloging in Publication (CIP) Upgrade Unit Staff will attempt to create authority records for new series. However, it is unknown how comprehensive they can be since coverage will depend on the total volume of work in front of the staff.

Next to speak was Karen Douglas. The 2005-2006 chair of TS-SIS, who was involved in drafting the AALL response to the LC series decision, briefly summarized that process and the eventual response. AALL decided to join the Special Libraries Association in a May 26, 2006 statement opposing the decision. A PDF copy of the statement is available from the AALL Washington Affairs website at http://www.ll.georgetown.edu/aallwash/lt05262006.pdf.

Robert Oakley, director of the Georgetown University Law Library, offered his perspective as a library director and as an AALL Washington Affairs Representative. He believes that the report by Karen Calhoun on the changing nature of the catalog, available at http://www.loc.gov/catdir/calhoun-report-final.pdf, likely signals the direction of future decisions by LC. Addressing the concern many in the library community have had about the sudden nature of the series decision, Oakley said he has been assured by Deanna Marcum of LC that AALL will be among the groups consulted for future decisions.

To end the formal part of the session, Ms. Goldberg recommended that to gain LC's attention, the cataloging community should provide solutions to controlled series access, rather than simply criticize. Ms. Whited echoed this statement by calling for the community to cooperate on a series access policy and then share it with LC.

In the commentary portion of the program, TS-SIS members informally debated the LC series decision. Those in favor of the decision argued that studies have shown series control to be uneconomical. Further, they argued, keywords can still provide access.

The majority of the comments opposed the decision. Among the points made were that studies on series have not accounted for the use of series in scholarly research, and that faculty and researchers often know and expect to find series classed together. In a related comment, one member argued that reference librarians would prefer more information in the catalog record, while removing series control would make *less* available. Another member also noted that the new cataloging code, RDA, will be based on concepts of the Functional Requirements for Bibliographic Records model, which relies on authority control.

However, several of those who argued against LC's decision nevertheless acknowledged that series control should be reassessed, and that now would be an opportune time to do so. Therefore, at the close of the session, moderator and new TS-SIS chair Rhonda Lawrence requested the formation of an ad-hoc working group to study controlled series access. According to its web site, the mission of the Task Group on Controlled Series Access in Law Library Catalogs is to develop best practices for series access in law libraries. Additional information is available at http://www.aallnet.org/sis/tssis/committees/cataloging/controlledseriesaccess/.

OBS Vendor Showcase in Five Parts

Reported by
Melanie Cornell
Franklin Pierce Law Center

Part 1: Introduction to summaries of vendor presentations

The summaries of the vendor presentations are based only on one person's notes. Please do not depend on this collection of information as a comparison between the vendors, or as representative of any research. There may be unintentional misrepresentation, and the information provided may be inconclusive.

Standards organizations commonly participated in by ERM vendors:
- CONSER, at http://www.loc.gov/acq/conser/
- DLF/ERMI (Digital Library Federal …), at http://www.diglib.org/
- SUSHI, at http://www.niso.org/committees/SUSHI/SUSHI_comm.html

Note: Each of the four vendors who made ERM presentations during AALL 2006 provide the ability to manage digital resources down to a title level. In other words, they don't stop at the aggregator level of electronic resources.

Part 2: Innovative Interfaces, Inc.

Innovative Interfaces Inc.'s (III) electronic resources management product, which is called ERM, has been out for a couple years (2002; general release 2004). As of July 2006, there were 171 ERM installations worldwide and the product was on its 3rd release.

ERM produces usage statistics based on SUSHI standards (SUSHI Universal Student Help Interface), cost per use calculated for titles and resources. ERM is also compliant with the Digital Library Federation's Electronic Resource Management Initiative (ERMI) guidelines.

ERM may be implemented by either stand-alone libraries or by Millennium libraries. The ERM product is not dependent upon III's ILS, Millennium. It also supports a consortium environment.

An ERM customer may opt to separately purchase III's knowledgebase, CASE Access Services (an A-Z list), or use a different knowledgebase. The CASE knowledgebase is based on coverage data checks for bibliographic for holdings (print format). III will create additional records for the knowledgebase as necessary.

ERM provides a public interface, which displays wording such as "This title available at [resource]," in addition to showing access to the terms of use and access to the resources. All resources from which a title is available, including coverage of each resource, are listed together. ERM can also display authorized users per license agreement.

ERM can fully index resource records, and customers can add subject headings to resource records. Resource records with associated subject headings enable patrons to key something like "law" to get a list of electronic resources containing legal information.

ERM supports volume and issue enumeration.

A *sampling* of data elements managed in ERM includes:
- Reports
- License
- Contacts
- Address
- phone #
- Manage workflow
- Analyze collection overlap
- Collection analysis tools

Customers can set up ERM's rule-based tickler alert system to produce emails to staff, to meet deadlines, and to manage workflow. It also keeps a tickler log showing when particular tasks occurred.

ERM system administrators can set different authorizations for various data (passwords, etc.), to set up relevant staff access to the data.

For Millennium libraries only…
- ERM integrates seamlessly with Millennium staff modules
- It automatically creates serials holdings records
- CASE, the knowledge database, can integrate with III's WebBridge Open URL link resolver
- ERM pushes data thru the Millennium OPAC for public view
- One database record has attached checkin records for each title accessible via that resource

III plans for its ERM MARC records service to include CONSER records in the future.

URL for III's ERM product description at http://www.iii.com/mill/digital.shtml#erm.

Part 3: Meridian (vendor: Endeavor)

Endeavor's representative, Patrick Jones, began by observing that there are fewer than a handful of electronic resource management (ERM) products commercially available. Libraries have tons and tons of contracts, and need ERM systems to manage the data. Most libraries are reportedly spending 30% to 50% of their acquisitions budgets on electronic resource products, but there is no staff growth to support this increase in complexity of workflow and information management.

Meridian is an Oracle-based product which supports the Digital Library Federation's Electronic Resource Management

Initiative (ERMI) guidelines in its goal to enable customers to analyze comparable products, support different access methods, and manage a variety of licensing details. Meridian permits customers to spread the input of their electronic resource data to the staff closest to the source by not limiting their customers to one or two users in a library.

Meridian makes available approximately 400 fields for customers to potentially use, as best suits their needs, to manage their digital information. Meridian describes access rights, limitations, and what patrons can do, and pushes this information out to the OPAC.

A *sampling* of data elements managed in Meridian includes:
- Resource
- Status
- Staff control of public display
- Coverage
- Licenses
    - Parties
    - Scanned copy located at [URL]
    - Start date, end date, execution date
    - Permissions statement
    - Display rights
    - Digital copy
    - Print copy
- Acquisitions
    - Down to the invoice level
- Trials & evaluations
    - History

Meridian can be set up to send an alert for when a subscription's (license's) expiration date is approaching. Acquisitions data includes the purchase order, down to the invoice level. Customers first getting started with Meridian can use import filters to bring in A-Z list data to begin to populate their records. Various reports are built into Meridian. Meridian is a useful tool for bringing together all licensing data for each resource, resource properties, associated MARC records, products, and more.

Meridian provides full support for managing electronic resource life cycles, including integrating with the customer's ILS:
- Selection
- License agreements
- Life cycle data (acquire, maintain, monitor)
- Historical data

Looking to the future, Mr. Jones pointed out that XML standards for electronic resource contracts are currently under consideration.

URL Meridian product description at http://www.endinfosys.com/software/brochures/full_meridian_FINAL.pdf.

Part 4: Serials Solutions

An incredible amount of metadata, such as URLs, passwords, administrative passwords, contacts, etc., need to be maintained by libraries for electronic resources. Serials Solutions' electronic resources management system product (ERMS) is built around their philosophy that libraries want to have central control in one place for easy maintenance and access to their digital resources. Serials Solutions is mindful of standards and guidelines relevant to electronic resources, such as the Digital Library Federation (DLF). Serials Solutions is involved with SUSHI (SUSHI Universal Student Help Interface) and will incorporate SUSHI standards of usage statistics once available. Serials Solutions has been a CONSER affiliate member since June 2006.

A *sampling* of data elements managed in ERMS includes:
- License
- Contact manager
- Subscription metadata
- Alerts
- Vendor statistics

- Incident log
- Terms of use

ERMS can handle the management of full-text resources, abstracting & indexing resources, ebooks, reference databases, image archives and more.

Serials Solutions has a long history of developing their knowledgebase. ERMS provides librarians with analysis tools to view selection choices of peer groups, identify duplicate coverage, and keep aware of usage statistics. ERMS is integrated with additional resource discovery tools, hosted on Serials Solutions' servers (ASP model), rich with features that solve management issues.

Serials Solutions normalizes titles covered/aggregated in multiple electronic resources. This is a key element in the reporting of data in a manner useful for librarians' analyses for making collection development decisions. Additionally, each normalized title is linked to each applicable aggregator, eliminating duplication of common changes by staff.

Some additional notable features of ERMS:
- Customer can set up automatic email notices about resources with changes in status (such as if something is now on trial).
- Multiple licenses may be attached to a single resource, with one set as the prevailing license.
- Serials Solutions has over 170 ERMS clients worldwide.
- ERMS was rated as "outstanding" in a recent satisfaction survey of users.
- Over 98% of existing customers renew their subscriptions to all Serials Solutions services.
- Lexis and Westlaw titles are represented in Serials Solution's knowledge base.
- Serials Solutions works with individual libraries if they need resource information inserted into the knowledge base (titles, metadata, etc.)
- Administrators can set different levels of authorization among staff users (e.g. edit, view-only)

Some elements of the ERM life cycle represented in ERMS are:
- Discovery
- Pre-acquisition
- Trial
- Acquire
- Customize
- Access
- Post-acquisition evaluation
- Ongoing issue management

In the future, Serials Solutions hopes to use XML to map terms and conditions of licenses to specified fields. They stressed the importance of licensing information, and argued that in the long run it's worth it for libraries to take the time now to digitally record their electronic resource information, even if they do so independently, not using a commercially available ERM service. It will be easier to populate a commercial ERM in the future using digital metadata recorded now, rather than having to manually input data.

URL for ERMS product description at http://www.serialssolutions.com/promotion/ERMS/.

Part 5: Verde (vendor: Ex Libris)

Verde, the Ex Libris electronic management product, is not tied to or dependent upon Aleph, Ex Libris' ILS (i.e., you don't need Aleph to use it), though it does work particularly well with Aleph. Ex Libris touts the quality and volume of Verde's knowledgebase of electronic resources. In addition to solo library settings, Verde seems uniquely suited to consortium environments, having been built from the ground up to meet consortium requirements. As a result, it offers a good administrative view of all consortium member libraries subscribing to a single resource, together in one place.

Verde is built in accordance with Digital Library Federation standards, including how they handle: Eproduct type (journal), CODEN, ISSN, Title, and Abbreviated title. Ex Libris is also a participant in SUSHI, a NISO group working on standards to harvest user statistics from vendor websites so you can get statistics through one place.

A *sampling* of data elements managed in Verde includes basic elements:
- descriptive
- licensing

- financial
- admin/support
- access

Verde components customers can report from include:
- interface
- package
- constituent (constituent record = individual title record)

Verde includes a history of "incident logs," tracking "not good events." *Some* life-cycle elements managed in Verde are:
- Auto-renewal
- Summary
- e-Product
- Acquisition
- License
- Access
- Admin
- Trial
- Cost
- Usage
- Workflow

A *sampling* of license elements represented in Verde includes:
- ID
- Type
- Method
- Execution date
- License duration
- URI
- Details
- Terms
- Notes
- License review
- Locations
- Users

Additionally noted features of Verde:
- Customers can alter defaults of what is viewed at title level
- Customers can designate a subscription as "selective" as opposed to all possible
- Journal titles are listed alphabetically
- Verde knowledgebase: 400,000 maintained centrally at Ex Libris
- XML gateway takes patrons directly to resource (to citation level within database)
- Verde can be searched for packages by subject
- Administrators can set up separate authorizations for staff users to have specified roles

For SFX subscribers only:
- SFX ID information gets pushed to SFX out of Verde (this eliminates dual maintenance)
- At installation SFX subscribers can back-populate Verde fields from their SFX notes.

ExLibris reported at the presentation in July that a discussion with LEXIS-NEXIS about an XML gateway was in process "as we speak." At that time, the company had no similar plans underway for Westlaw.

URL for Verde product description at http://www.exlibrisgroup.com/verde.htm.

Conversations Across the Cubicles: Pioneering Change in the TS-SIS 1978-2006, TS-SIS Discussion

Reported by
Hollie White
Arizona State University

The meeting room for this program was very small, and there were so many people in attendance that many ended up standing in the back. The setup consisted of a panel of four TS-SIS members: Margaret Axtmann, Patricia Satzer, Phyllis Marion, and Patricia Turpening. Questions were directed to specific panelists. After a panelist was asked a question or given a specific event to elaborate on, she would discuss her involvement and her feelings at the time.

How the SIS Began:

The session began with directed questions about the history of TS-SIS. The first date that was brought up was June 23, 1976. On that date AALL passed bylaws that provided for the creation of special interest sections. TS-SIS was not created until the 1977 annual meeting. Phyllis Marion talked about the Toronto meeting that was held that year, and her efforts to bring together different groups of people. This was during the time of big AACR discussions, so one big concern was to make sure that the Cataloging and Classification Committee could keep its voice and still act on behalf of AALL, and that it wound not lose importance by becoming part of TS-SIS. During the following year, the board agreed that the Cat/Class Committee could continue to speak on behalf of the Association. It was in 1978, at the Rochester meeting, that TS-SIS really launched itself, presenting a program that year entitled "Planning for Change in Technical Services."

The Addition of Other Areas of Technical Services:

Acquisitions and collection development became involved with the section a bit later on. With the advent of automated systems, workflow changed and the need to focus on these areas increased. Acquisitions soon became a big focus for the section. Preservation was actually asked to join TS-SIS because the TS-SIS bylaws included a section on preservation. The Preservation Committee was formed in 1983. At first there was a split between those who wanted to focus on rare books and those who wanted a broader focus on the preservation of general collections, but the broader focus prevailed. Some actually wanted a separate SIS just to focus on preservation. Somewhat later, binding was added to the areas covered by the Preservation Committee.

OBS and TS:

One question was why the Online Bibliographic Services SIS is separate from the Technical Services SIS. The original OBS focus was on catalogers and the systems those catalogers used. While there have been several proposals to merge the two sections, these measures have always been voted down.

The Newsletter That Became a Publication:

The newsletter was brought up as an important asset of the section. It began in 1975 as *The Law Cataloger*, with editor Phyllis Marion. It became *Technical Services Law Librarian (TSLL)* in 1979. The different editors of the magazine, including Pat Turpening, discussed the challenges of editing before automation. In 1992 *TSLL* switched from a subscription-based publication to a complementary benefit of section membership. More recently, the "newsletter" label was dropped in favor of "publication," and in 2005 *TSLL* became available in online format only. It continues to be praised as one of the greatest achievements of the section.

Bygone Tools and Buzz Words:

One especially entertaining part of this program was a section where certain tools, techniques, and terms that were used but are no longer a daily part of technical services work were discussed. Topics that were brought up: tying catalog cards together with string, electric erasers, and whether white-out was an adequate correction tool. Terms that were discussed included "forcing," "superimposition," "red top," and "down filing."

Renee D. Chapman Award:

Another topic that came up was the Renee D. Chapman Award and its namesake. Renee Chapman was TS-SIS chair for 1988/89. She was always very organized and very kind. After she died the award was named for her. Margaret Axtmann chaired the first committee that awarded the Renee D. Chapman Award, which went to Phyllis Marion.

Overall Role Played by the Section:

Phyllis Marion: The seventies and eighties were the height of cooperation with OCLC, AACR2, and CIP. People thought that together we could make change happen.

Patricia Satzer: The best aspect is that the SIS brings us together to cooperate.

Margaret Axtmann: The SIS promotes the spirit of communication at a national level.

What Does the Panel See in TS-SIS's Future?

The panelists all agreed that TS-SIS is strong today and will remain strong in the future. If an SIS is as good as its members, TS-SIS can count on continuing to be exceptional. It has raised the visibility of all aspects of technical services, and through active participation its members learn valuable skills that they wouldn't normally learn on the job or through regular continuing education programs.

21st Century Technical Services: Reorganizing for the Future, TS-SIS Forum

Reported by
Georgia Chadwick
Law Library of Louisiana,
Louisiana Supreme Court

This forum was coordinated by Karen Douglas of Duke University Law Library (and the 2005-2006 chair of TS-SIS). An overflow crowd was in attendance at a very entertaining and lively panel discussion featuring: Carol Avery Nicholson of the University of North Carolina at Chapel Hill Law Library, Andrea Rabbia of the Syracuse College of Law Library, and Joe Thomas of the Notre Dame Law School Library. During the introductions, the room was stunned for a silent moment before laughter broke out when Karen Douglas revealed that Joe had been the writer behind the column "Miss Manager," which appeared in *Technical Services Law Librarian* several years ago.

Karen had posted questions on the TS-discussion list to come up with real situations facing technical services librarians as their departments are asked to incorporate more departmental responsibility requiring various changes. Three main topics for discussion were presented. The first topic covered the reorganization process. Panelists were asked what specifically precipitated reorganization and to share their experiences. The second topic addressed the effect of electronic resources and how technical services staff can avoid feeling that they are making everything up as they go along. This topic also examined ideas for how existing staff should keep up with new skills as they become necessary and what skills new employees should acquire. The last topic was a brief discussion of space planning for a law firm library.

Each panelist discussed a number of reasons their departments faced change and each one agreed that change always presents unique opportunities to rethink the mission of the technical services department. A job opening should always be examined to determine if new skills may be needed in replacing an employee who has been in the position for a long time. It was suggested that the supervisor spend time learning exactly what an employee does by sitting with them on the job. Even if there is no vacancy a critical evaluation of what everyone does can be very helpful. Carol Nicholson enumerated a number of questions she asked her employees, such as: What is the most important thing you do every day and what is the least important? What would you rather be doing? Does everything you do fit with the library's mission? If there were no student workers, what tasks would be neglected? Joe Thomas said the organization should not be totally driven by the people but that a great plan does have to take into account how existing people will fit in. and that a balance must be found. Andrea Rabbia mentioned that in seeking new employees who may not have exact experience with checking in materials she looks to gaming skills to learn how the person would solve a problem, or observes if they try something creative or stop and read the manual? When supervisors are asked to take on more responsibility, that is another potential opportunity which needs to be carefully considered and accommodated if possible. A daunting challenge to the status quo in a technical services department may require some creative thinking, but the result of carefully thought out response to change may benefit the department in many ways.

The increasing presence of electronic resources has had major effects on technical services departments, and the panel discussed how to cope with this rapidly changing landscape. In some ways it is hard to avoid making it up as we go along. Carol Nicholson said that dealing with electronic resources is an evolving process but suggested that having procedures in place is very important. All three panelists said that a group approach between technical and public services is highly effective to make sure that all aspects of selecting, evaluating, purchasing and paying for electronic resources are appropriately covered. One-stop shopping in the OPAC means many decisions the technical services department has to make regarding how to make resources available to the library community in a way that is most convenient for users. Electronic resources management systems were mentioned, and some libraries have found them to be very helpful. At the end of the program, the audience clamored for a workshop in the future about how to best incorporate electronic resources into the department.

Betty Roeske, who was in the audience, shared her experience with the final topic regarding technical services space planning in a law firm library. Betty said that space is very tight but because technical services departments in the past required their own printers, which were considered noisy, it turns out to be a benefit when the department gets its own private space!

Clearly Karen Douglas made the right decision when she proposed a "forum" for her program, as a forum allows a formal presentation first, after which the participants are encouraged to ask questions. A great deal of useful information was generated from the interaction between the presenters and the participants.

What Public Services Should Know Regarding Technical Services and Vice Versa, ALL-SIS Program

Reported by
Rosemary LaSala
Reference/Government Collections Librarian
St. John's University Rittenberg Law Library

The theme "`Pioneering Change" at the AALL Annual Meeting was fitting, and the entire experience was thought-altering. Many of the sessions were designed to take the attendees out of their normal realms and into the future of law librarianship. This was not an easy task as many of the attendees have been doing their respective jobs for years. This ALL-SIS program was one such session that motivated librarians to examine their course of action when faced with the challenges facing both departments.

The three presenters Brian Flaherty, Sarah Boling and Edward Hart, began their presentation by introducing themselves. Their combined years of experience in reference, cataloging, and librarianship solidified their beliefs that Technical Services and Public Services do work towards the same goals and that interaction between the departments is vital to provide the best services the library can offer. Each department feels overworked, over burdened, and that there is not enough time in the day. The most obvious common ground between the two departments is the OPAC. Therefore, it is important that the librarians are well trained on OPAC functions. Too many people in this profession assume that all librarians know their OPACs and how their catalog works. However, this is not always the case.

What Technical Services can teach Public Services:

- How the OPAC system works
- How to search the OPAC system
- How to search the OPAC system from the staff mode
- Create lists, run reports, etc.
- How the system is constructed
- Reference and Public Services should know where the information they need is going to be found
- Librarians must realize that changes can be made to the OPAC— changes can be made to the bibliographic records to make them more searchable. If there is a better way to present the data, then it is possible to make changes.

What Reference Librarians can teach Catalogers:

- Because Reference Librarians are the eyes and ears of what people say about the public interface of the catalog, they can provide insight for catalogers as to the needs of the public
- How patrons, our users, ask for, and access information
- Reference librarians want to know about new system releases, attend cataloging meetings, and be aware of the changing ways in which people access information ex: new federated search engines, (FRBR)
- Reference librarians can teach Technical people about the legal system and the process and publication timeline for legal materials, especially primary materials.

The question now becomes how we make these changes happen; small changes over time can make a big difference. Some ways in which changes can be carried out are:

- It is important that the departments have regular interaction with each other, and this can be done by situating them in such a way that there is communication on a regular basis
- Adjust the physical spaces so that the departments are closer together
- Departmental crossover or at least cross training
- Technical Services Librarians who are willing to work at Reference, and Reference /Public Service Librarians willing to work in Technical Services
- Internal information sharing

- Departments usually have meetings. Send the minutes of the meeting to the other group
- Don't wait for those "teachable moments," make them happen!

The presenters did not feel they had all the answers to the problems facing Technical and Public Services, but with open communication and successful interaction between the departments, the end product can be very beneficial to the users of the library and the staff themselves.

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suggested the title, "I Never Metadata I Didn't Like," to the delight and groaning of many. Lucinda Harrison-Cox, Public Services/Electronic Resources Librarian at Roger William University School of Law, attended most of the rehearsals in St. Louis and rendered invaluable assistance.

Countless emails discussed whether or not to include the Leader and whether or not to read the spaces in the MARC record, etc. Losing the audience was a big consideration! The committee decided to include the major fixed fields and to forget about voicing the spaces. A drum beat was chosen to introduce the narrator's lines and a dulcimer strum to introduce the chorus. A simultaneous drum beat and dulcimer strum signaled the end of a field. More elaborate musical punctuation had been considered: various notes of a toy xylophone for a period, comma, etc. Simplicity became the goal. Most heartfelt thanks go to Pam Deemer for bringing both drum and dulcimer to St. Louis.

Almost 600 emails went back and forth before the Centennial Meeting! Betty Roeske kept us from alienating multitudes by setting up a listserv just for the skit committee. Sally Wambold, in consultation with Janet Hedin and computer wizard Paul Birch, recorded the script for practice purposes. Making that recording was a project in itself.

Final polishing of the script actually occurred in St. Louis. It was surprising how many more decisions were required. A few examples follow: Numbers were spoken individually unless they represented a year. For subfields, the word subfield was used rather than the punctuation term delimiter. The preliminary pagination x, was expressed as Roman ten. The group decided not to vocalize the parentheses in the subject fields. All decisions about pronunciation were made with the goal of being friendly to the audience.

The entire group marvels at the congenial way we worked together. Here is the OBS Metadata cast with affiliations.

Curt Conklin	Brigham Young University Howard W. Hunter Law Library
Pam Deemer	Emory University Hugh F. MacMillan Law Library
Janet Hedin	Michigan State University College of Law Library
Angelina Joseph	Marquette University Law Library
Chris Long	Indiana University School of Law – Indianapolis Law Library
Peggy Perrin	New York Law School Library
Andrea Rabbia	Syracuse University College of Law H. Douglas Barclay Law Library
Betty Roeske	Katten Muchin Rosenman LLP Law Library
Mila Rush	University of Minnesota Law Library
Karen Selden	University of Colorado Law Library
Sally Wambold	University of Richmond Law Library

Warm thanks go to the lurkers on our listserv who supported us (Georgia Briscoe, Richard Jost, Ismael Gullon, and Caitlin Robinson). Also, a big thank you to all the contributors, hidden in those 600 messages received by the OBS skit listserv and who participated in this project in any way, especially the mastermind and host of the Centennial Variety Show, Kelly Browne. Finally, the skit was officially dedicated at the performance by narrator Curt Conklin to the memory of Henriette Avram, who actually made it possible by creating the MARC record.