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INSIDE:

From the Officers

OBS-SIS.....	3
TS-SIS.....	4

Reports

AALL in New Orleans.....	1
AALL MARBI.....	23
Acquisitions Committee.....	10
Acquisitions Roundtable.....	11
Acquisitions Workshop.....	55
Awards Committee.....	12
Blogging and Beyond.....	57
Bringing the Library to the User....	38
Capture & Preserve Gov't Web.....	48
Casting A Wider Net.....	56
Cat & Class Committee.....	13
Cat & Class Roundtable.....	14
Challenge of Publishing.....	41
Class & Subj Cat Policy Advisory.....	15
The CONELL Experience.....	36
Developing a Scholarly Agenda.....	50
E-life Cycle Management.....	44
Electronic Preservation.....	40
The Future of Cataloging.....	49
Joint Research Roundtable.....	22
Legal Publishing.....	46
Managers Issues Roundtable.....	16
Metadata Standards Workshop.....	51
My First AALL Experience.....	35
New Catalogers Roundtable.....	17
OB-SIS Business Meeting.....	20
OCLC's WorldCat.....	51
Preservation & Binding Round.....	17
Serials Committee.....	18
Special Com on Record Sharing....	21
Training.....	39
TS-SIS Business Meeting.....	6
Vendor-Supplied Records.....	19
WorldCat Coll Analysis Service....	37

<i>From the Editor</i>	6
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AALL in New Orleans

Karen M. Wahl
Fordham Law School Library

I was lucky enough to be chosen as the TS-SIS VIP for this year's AALL Annual Conference in New Orleans. This experience gave me the opportunity to connect with a number of the "movers and shakers" in our profession, including Rhonda Lawrence, Alan Keely, Ellen McGrath, Brian Striman, Melody Lembke, Sima Mirkin, Cindy May, Pat Turpening, Linda Tesar, Jolande Goldberg, and Jean Pajerek, to name just a few.

I really feel that I got a lot more out of my second conference than my first in St. Louis. Instead of wandering around in a daze, like a deer in the headlights, I was running around like a chicken with my head cut off trying to make *every* meeting, see *every* person, and go to *every* event. It is a good thing! I promise! It was a much more intense and wonderful experience, knowing what to go to, and more importantly, WHY I wanted to go—and getting involved in groups that actually make a difference, like the TS-SIS Education Committee.

My first meeting was the New Cataloger's Roundtable, led by Melody Lembke. It was a wonderful forum where newer catalogers felt comfortable asking questions that they may have felt nervous about asking in a larger group. Melody was a fantastic speaker and really put everyone at ease. These new catalogers have a lot of energy and will add a lot to the profession, so keep on the lookout for them!

It was also very fascinating to attend the TS-SIS Hot Topic session on RDA. This is a really interesting time to be a cataloger. A lot of hard work is going into the creation of RDA and people are really passionate in their positions of how they think it is going. I'm curious to see the final product!

Luckily, these conferences are never "all-work-and-no-play." As usual, the Lexis and Thomson/West parties (with accompanying food) were phenomenal... did anyone try that white chocolate bread pudding? Divine!

I also attended a few dinners and socials for various committees and subcommittees, including the Gen X/Gen Y Social, where I was able to bond with some of the younger librarians of the same ilk, over "hurricanes" and "po'boys."

I am really pleased that AALL made the choice to hold the Annual Conference in New Orleans. It is really important to for groups like ours to help contribute

Continued on page 43

*A Publication of the Technical Services Special Interest Section and the
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ALA Committee on Cataloging: Description and Access (CC:DA)

Kathy Winzer, Stanford University (2006-2007)

ALA Subject Analysis Committee (SAC)

Yael Mandelstam, Fordham University (2005-2008)

OBS/TS Joint Research Grant Committee

Chair, Ruth Funabiki, Univ of Idaho; Richard Amelung (ex officio);

OBS-SIS Reps: JoAnn Hounshell (2007-2008); Chris Long (2007-2009)

TS-SIS Reps: Kathy Faust (thru 2008); Patricia Satzer (2007-2009)

Online Bibliographic Services Special Interest Section

“Oh, my dear little librarian. You pile up enough tomorrows, and you’ll find you are left with nothing but a lot of empty yesterdays. I don’t know about you, but I’d like to make today worth remembering.”

I often reflect on these words by the infamous Harold Hill to Marian the librarian in the 1962 film *The Music Man*. They are poignant and priceless to me; and it is with this perspective that I step forth as your OBS chair. My desire is to make my time as your OBS chair worth remembering—both for you and for me. I realize I cannot do that on my own, so I need to start by thanking some very special OBS members who have helped OBS become one of the best sections in AALL.

First and foremost I want to thank Susan Goldner who has been generous with her both time and knowledge. I certainly appreciate all that she accomplished as past OBS chair and I hope to be as successful as she has been. I also want to thank our out-going executive board members for their tireless work over the last two years: Kathy Faust, who faithfully served as our secretary/treasurer, and Caitlin Robinson, who barely made it off the OBS board before being asked to step in to fill a vacant member-at-large position. Thank you both for your dedication. I would also like to acknowledge our out-going Committee Chairs and representatives, without whom the work of OBS would not be done. I send heartfelt thanks to Mary Jane Kelsey (Local Systems), Kevin Butterfield (Nominations), Pam Deemer (OCLC), Shannon Burchard (Web Advisory) and Caitlin Robinson (OBS/TS Joint Research Grant Committee). I am thankful we have such willing members, whereby OBS is able to accomplish something memorable.

Let me also take a few sentences to say how pleased I am to be working with a new crew of OBS members willing to volunteer. Not only our new board members: Michael Maben, Mary Strouse and Susan Karpuk; but also our new OBS standing committee chairs and representatives:

- OBS Local Systems Committee Chair: Elaine Bradshaw (2007-2009)
- OBS/TS Joint Research Grant Committee Chair: Ruth Funabiki (2007-2009)
- OBS/TS Joint Research Grant Committee, OBS Representatives: JoAnn Hounshell (2007-2008) and Chris Long (2007-2009)
- OBS Nominating Committee Chair: Richard Jost (2007-2008)
- OBS OCLC Committee Chair: Keiko Okuhara (2007-2008)
- OBS RLIN Committee Chair: Ming Lu (continuing 2007-2008)
- *TSLL* OBS Representatives: Ellen McGrath (2007-2009) joins Janet McKinney (continuing 2006-2008)
- OBS Web Advisory Committee Chair: Kevin Butterfield (2007-2009)

Thank you one and all for your willingness to serve the OBS membership.

As this issue of *TSLL* highlights our 2007 AALL Annual meeting, it seems odd to me that lately most of my effort and energy has been spent preparing for the 2008 Annual Meeting in Portland! As you know, in the previous year, as OBS Vice-Chair, I had the privilege of chairing the OBS Education Committee. We had a fantastic committee, working hard to prepare program proposals for 2008—my sincerest thanks to all who served! Their hard work is evident in the eleven quality program proposals OBS submitted to the AMPC:

- “Can Anyone Police File Sharing: The Evolution of the Proposed AALL Ethical Record Sharing Policy”
- “Demystifying Batch-Load Analysis: What You Need to Know About Vendor-Supplied Bibliographic Records”
- “Encore, Enterprise, Primo & WorldCat Local: Explore the Evolving Discovery Tools for Your Catalog”
- “Energizing the OPAC with RSS”
- “Explore the Effective Use of Cataloger’s Desktop”
- “Explore the Effective Use of Classification Web”
- “Exploring Relevancy Ranking Systems in Search Engines on the Web and in our OPACs: What They Are—How They Work”
- “The Good, The Bad, the Ugly: Rethinking Bibliographic Services in the 21st Century”
- “All Good. No Bad, No Ugly. Options for Bibliographic Control in the 21st Century”
- “Making your TOCs Tick: Maximizing the Usefulness of Tables of Contents in Your Library”

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- “You want me to do what? Bridging the gulf and building understanding between technical services and public services managers”

We also cosponsored a program proposal, submitted by SCCLL, called “Using WorldCat.org's Social Software to Promote the Law Library.” As you enjoy reading reviews and highlights of all the wonderful 2007 Annual Meeting sessions, please stay tuned to the OBS list to hear what programs have been accepted for the 2008 Annual Meeting.

So what other plans do I have for making my term as OBS Chair worth remembering? Well, to start with, I plan on creating a Special Committee on Bylaws and Governance to revise our bylaws so we can merge the OCLC and RLIN Standing Committees; this committee will also address the inconsistencies between the bylaws, procedure manual, planning calendar and website. The executive board and I are also considering a Special Committee to investigate ways to take advantage of the AALL/BNA Continuing Education Grants Program, as well as investigating a possible AALL representative to OCLC. Other goals include more outreach within AALL, such as broadening the local system roundtables, which Susan Goldner introduced at the 2007 Annual Meeting, to include those local systems used by PLL members. Let me encourage you to watch the OBS list for opportunities to participate in these endeavors. Moreover, let me encourage you to respond to the call to volunteer! The OBS Executive Board looks forward to working with **everyone** to make OBS-SIS one of the best section in AALL.

Andrea R. Rabbia
Syracuse University College of Law

From the Chair

T echnical Services Special Interest Section

Greetings! I will try to keep this column brief, as I know you are anxious to get started reading the rest of this jam-packed issue. Up front, I consider it an honor and a privilege to be serving as chair of TS-SIS. I know I have some very big shoes to fill and I will do my best to fill them. Serving as vice chair/chair-elect this past year has been an incredible learning experience for me. I have met and worked with so many wonderful people and spent time learning the ropes of how this organization actually works.

This past year has been a busy one for TS-SIS. The Education Committee, chaired by Rhonda Lawrence, put together a record number of Annual Meeting workshops and programs. This was also the first year of the Annual Meeting being shortened from five days to four. This change inevitably created more than the usual scheduling conflicts. I appreciate hearing from many of you that you felt there were too many conflicting meetings and that you couldn't get to everything you wanted to. The Executive Board will be working with the Education Committee to try to strike the right balance between programs, roundtables, and committee meetings. If you have some thoughts on this issue, please let me hear from you. This is the time of year when a lot of the meeting schedule gets decided.

One my goals for this year is to try and get more of the younger members of TS-SIS involved in the activities of the SIS to give them a better understanding of how things work. For example, the New Law Catalogers Roundtable, which started at the Saint Louis meeting with 17 members, has grown to over 30 members. Some of these individuals have been recruited to serve on TS-SIS standing committees. Others have been asked to help develop program and workshop proposals. The enthusiasm they bring to what they do is exciting.

To this end, let me say a few words about the volunteer survey that was conducted last spring. I know you probably got tired of my daily emails reminding you to fill out the survey, but the bugging paid off. The response rate to the survey was 33%. While that is still rather low, it is considerably better than in previous years. I have asked the TS-SIS Membership Committee to look into revising the volunteer survey to improve it. If you have suggestions for ways to improve the survey, please email me. Craig Lelansky, the Membership Committee chair, and his committee are excited about their work and are looking for ways to increase the membership of TS-SIS, and to get more of the members involved.

At its July meeting in New Orleans, the TS-SIS Executive Board voted to revise the way the Education Committee functions. For the past two years, the vice chair/chair-elect has been the chair of the committee. However, through a quirk of the

calendar, most of the duties of the committee chair occurred when the vice chair/chair-elect was serving as chair of TS-SIS. Hence, a lot of TS-SIS business got sidelined until after all the Education Committee tasks were finished. The approved change creates an Education Committee that will oversee all of the programming and activities leading up to each AALL Annual Meeting. The chair of the committee will be appointed by the TS-SIS Executive Board with the vice chair/chair-elect serving as ex officio. The vice chair/chair-elect will also serve as liaison to the Executive Board. I think the decision was the correct one for TS-SIS, as it will significantly reduce the workload on the TS-SIS chair and allow another person to become involved.

For those of you who were not present at the TS-SIS business meeting in New Orleans, one of the highlights was the presentation of the Renee D. Chapman Memorial Award for Outstanding Contributions in Technical Services Law Librarianship for 2007 to Mary Jane Kelsey, the Associate Director for Technical Services at the Lillian Goldman Law Library, Yale Law School. Her director, Blair Kauffman, presented the award. We congratulate Mary Jane on this award and the addition of her name to the list of previous recipients, which reads like a who's who of technical services. Also presented were certificates of appreciation to Brian Striman for his work on making the *Technical Services Law Librarian (TSLL)* the essential tool that it is for all of us, and to Pat Turpening for her years of service as chair of the Preservation Standing Committee. With the 2007 meeting, Pat has stepped down as chair of the committee.

The Education Committee has been hard at work developing program and workshop proposals for the 2008 AALL annual meeting in Portland, Oregon. Three workshop and five program proposals were submitted to the AMPC by the August 15th deadline. In addition, four additional proposals were cosponsored with OBS-SIS. A lot of work went into the development of these proposals and I think the committee has approved a very strong slate of programs.

The people I need to thank for their hard work and support this past year are too numerous to print here, so if your name is omitted, please know that you have my sincerest thanks. I would, however, like to thank those officers and committee chairs for their dedicated service to the TS-SIS who are stepping down from their positions after the New Orleans meeting: Karen Douglas, TS-SIS immediate past chair and chair of the Bylaws Committee; Pat Turpening, Preservation Standing Committee chair; Janice Anderson, member-at-large; Ismael Gullon, *TSLL* liaison; Ellen McGrath, Awards Committee chair; Nancy Poehlman, TS-SIS representative to the OBS/TS Joint Research Grant Committee; Jeffrey Bowen, Membership Committee chair; and Regina Wallen, Nominations Committee chair. Most of all, I want to say a huge thank you to Rhonda Lawrence. She has been a wonderful teacher, guide, and friend this past year. She has done a fabulous job as chair and has helped TS-SIS take a huge step forward. Applause!

I also want to give a special "thank you" for their many hours of dedicated work to: Kathy Winzer, our CC:DA Representative; George Prager, our MARBI representative; and Yael Mandelstam, our SAC representative. All three of these individuals have done yeoman's duty this past year. As always, I wish to thank Martin Wisneski and Mira Green, without whom the electronic side of TS-SIS would crash and burn. Applause!

I am also excited to welcome our new officers and committee chairs who will serve during 2007/2008: Linda Tesar, vice chair/chair-elect; Carmen Brigandi, member-at-large; Janice Anderson, Preservation Standing Committee chair; Kathy Faust and Patricia Satzer, TS-SIS representatives to the OBS/TS Joint Research Grant Committee; Kevin Butterfield, Awards Committee chair; Craig Lelansky, Membership Committee chair; Gary Vander Meer, Nominations Committee chair; and Jim Mumm, our new TS-SIS representative to the *TSLL* Editorial Board. Applause!

Finally, the annual reports prepared by all of the committee chairs and representatives, the variety of reports of the many activities sponsored by the TS-SIS at the New Orleans meeting, and the wonderful and informative *TSLL* columns, all give an excellent picture of what TS-SIS is doing. I hope you will get involved in the activities of TS-SIS. There are some wonderful opportunities to network. I also encourage you to visit the TS-SIS website for useful information. And, oh yes, enjoy this issue of the *Technical Services Law Librarian*!

Alan Keely
Wake Forest University Professional Center Library

ANNOUNCING: TSL TechScans Blog

The "TechScans" column has a new feature. Thanks to Beth Geesey Holmes and Ellen McGrath for getting the TechScans Blog up and running. This allows the authors of the TechScans column to post new technological innovations as they happen. The column will continue to be published in *TSLL* as well. The blog offers an RSS feed for those who wish to have the information sent to them directly. The blog is available at <http://www.tsltechscans.blogspot.com/> or the *TSLL* website.

TSLL 2007 Conference Issue

I hope you enjoy this year's *TSLL* "Conference Issue." It's the collaboration of many colleagues who volunteered to take notes during the AALL Annual Meeting. They attended programs, roundtables, working groups, committees, and other OBS and TS events.

What I'm sure you *don't* enjoy, is that this issue, like others in the recent past, is late again. As with previous late issues, the timely publication of *TSLL* rests on my shoulders. In this regard, like in football, you don't concede the game—the coach keeps on making adjustments for the next game in order to get the desired results. After reviewing films and pondering on the trouble spots, I decided that I need a special kind of administrative associate. Someone close to me, who can keep me focused on the deadlines, and keep me on track.

My wife, Linda, is a retired elementary school teacher. She's not only had an endorsement to teach English Language Learners, and Special Education, but she also has an MA degree in Library Science. She certainly is qualified. She has agreed to help me. Not because of a sense of professional altruism, but because she hates it when I work late at nights, after procrastinating too long after the appropriate deadline to get everything to Julie for her layout work.

The other adjustment I also decided to make, is it may be better to work on *TSLL* at home, as my work environment simply has too many distractions. Now, when at home, when I decide to go out and mow the lawn, instead of working on *TSLL*, Linda can use the shepherd's crook on me. Silent and effective.

I also need this kind of help, I think, so I can finish up the pre-production end of the quarterly issues more timely, enabling me to then turn my attention to putting closure to the other *TSLL* outstanding projects that are listed in the 2007 *TSLL* annual report in this issue.

The December issue with its corresponding deadlines is coming up fast. Let's see how we do. There are columnists to contact and columns that need filled.

MINUTES

Technical Services Special Interest Section 2007 Annual Business Meeting — Draft Minutes

The meeting was called to order by TS-SIS chair Rhonda K. Lawrence. A quorum was verified.

Executive Officer Reports

Chair's Report: Rhonda Lawrence welcomed the members and said that her detailed report will be placed on the web site, and in this short presentation of her report she just wants to remark that this year we have a record number of activities: 5 developed programs that were selected by the AALL AMPC, 7 TS-SIS sponsored programs, 20 Committee meetings and 2 Workshops. Rhonda then recognized the TS-SIS Education Committee members who made a special contribution into the success of the current meeting: Carol Avery Nicholson, Ajaye Bloomstone, Jean Pajerek, Pat Turpening, Jim Mumm, Paula Tejada, Jolande Goldberg, Teresa Parker-Bellamy, and Alan Keely. Rhonda then continued by saying that two advisory working groups were set up this year: Descriptive Cataloging Policy and Classification and Subject Cataloging Policy, as well as a Task Force on Standards for Vendor Supplied Records and a Task Force on Series Treatment. Also, the Task Force on the LC Working Group on Bibliographic Control has just been established, and Rhonda called for volunteers to work on this Task Force to prepare a report due at the end of July. Rhonda pointed out that all the reports of the committees' and working groups' chairs have been placed on the TS-SIS web site and thanked the web master, Martin Wisneski, for his incredible work. Rhonda also specifically recognized Jean Pajerek in her role as chair of the Cataloging and Classification Standing Committee, and Alan Keely as the Vice chair for their great contributions this past year. She concluded her report by saying that this year would not have been so successful had it not been for the hard work of many, many members of the TS-SIS, and that it was an honor for her to be chair of this remarkable group.

Secretary/Treasurer Report: Sima Mirkin reported the online election results for 2007/2008 offices. Linda Tesar was elected

Vice Chair/Chair-Elect and Carmen Brigandi was elected Member-at-Large. 184 ballots were cast, making a return rate of 29%. The projected balance as of August 1, 2007 was \$12,528.01

Member-At-Large Reports

Joint Reception & Activities Table: Janice Anderson reported that TS-SIS took charge of the joint reception with OBS-SIS, CS-SIS, RIPS-SIS, and that it turned out to be a success—everybody had a wonderful time. Kris Niedringhaus (CS-SIS), Jessie Burchfield (RPS-SIS) and Corinne Jacox (OBS-SIS) provided great assistance. Because Marie Whited was unable to attend the annual meeting, the Activities Table was set up by Jeffrey Bowen, the outgoing chair of the Membership Committee.

Vote on acceptance of Preservation Committee bylaw Change and Bylaws Committee Report —Karen Douglas.

Karen Douglas said a vote should be taken today on the proposed amendment to the TS-SIS Bylaws Article IX, Section 1d, the text of which is on the web site. Karen read the existing text followed by the amendment:

Replace existing text:

The Preservation Standing Committee's purposes are to explore short- and long-term solutions to the effects of deterioration, neglect and disasters on all types of library materials and to serve as a clearinghouse on the subject for the Association.

With the following:

The Preservation Standing Committee is charged with focusing on measures to preserve legal information, in all formats, that is at risk due to deterioration, neglect or disaster and with addressing issues related to the preservation of and access to digital content. The Committee also serves as a resource on preservation for the American Association of Law Libraries.

There was a motion for the vote and a second.

Rhonda then asked for discussion, there was none, and she then called for a vote by show of hands. The vote was unanimous, and the amendment passed.

Standing Committee Reports

Acquisitions: This year the Acquisitions Standing Committee began to investigate two projects – a consolidation of law library collection development policies with the Academic SIS which will be kept as a single collection, and a cooperative effort with the Editorial Board of *ACQWEB* to collect, maintain, and make available legal publisher/vendor information. The collection development project has been on hold pending the return of the individuals necessary to speak with within ALL-SIS, and the *ACQWEB* initiative is just getting off the ground with the completion of a user survey by the *ACQWEB* Editorial Board. There are already volunteers within the Acquisitions Committee ready, willing and waiting to participate in both projects. As a preconference to AALL 2007 in New Orleans, Lorna Tang and other members of the committee proposed, organized and held a one-day Acquisitions Workshop titled “Delivering the Goods: Effective and Efficient Acquisitions Processes,” with well-known acquisitions librarians as its faculty. Since all 50 spaces available were filled by the conference early-bird pre-registration date, AALL headquarters agreed to open up an additional 10 spaces which in turn were filled also. Lisa Arm’s program on “Blogging and Beyond” is sponsored as a TS-SIS program, as is the program “Tips and Tricks for Successful Vendor Negotiation,” presented by Anne Robbins and Emerita Cuesta. The Standing Committee will hold its usual two meetings, a Committee meeting on Monday morning, and the Roundtable meeting on Tuesday at noontime. In a new format, the first half hour of the Roundtable will feature the “Tips and tricks” program, followed by a one-hour discussion of acquisitions issues.

Cataloging and Classification Committee: Jean Pajerek reminded the members about many more wonderful programs set up by the members of the Cataloging and Classification Committee still to be held at the Meeting. She said that this year’s roundtable is devoted to RDA issues hosted by Ann Sitkin with our CC:DA representative Kathy Winzer. There will also be Michael Gorman’s program on the “Future of Cataloging.” Jolande Goldberg’s program on “Indigenous Government and Law in the Americas” (Online classification). Richard Amelung, AALL’s appointed representative to the LC Working Group on the Future of Bibliographic Control, will discuss the findings at the public meetings and the ongoing activities of the Group right after the Cataloging & Classification Standing Committee Meeting tomorrow morning.

Preservation Committee: Pat Turpening said that she has retired a year ago, and that is why her two-year appointment as a chair ended early. Janice Anderson will serve as the chair. Pat reported that two of the Preservation Committee activities happened today: Preservation and Binding Committee Roundtable and the program “The Next Katrina: Are you ready?”

Serials Committee: Carol Nicholson reminded the attendees about the still-to-be held activities at the meeting: the program “What to Count, What to Report”, the Serials Standing Committee meeting, where there will be a report on exchange of

duplicates program. Carol also asked the members to watch for Project COUNTER and SUSHI (Standardized Usage Statistics Harvesting Initiative) protocol new developments – there is a subcommittee within the Serials Committee that is working on those.

Awards Committee Report

Ellen McGrath reported that this year four educational grants were given to the following recipients:

- Sean Chen is the recipient of the first TS-SIS Marla Schwartz Grant to support his attendance at "The Future Is Digital: Metadata Standards and Applications" workshop. Sean is Cataloging Assistant at the Duke Law School Library and also a student in the MLS program at the University of North Carolina at Chapel Hill.
- Edward Hart is the recipient of a TS-SIS Grant to attend the "Delivering the Goods: Effective and Efficient Acquisitions Processes" workshop. Ed is Acquisitions and Serials Librarian at the University of Florida.
- Tina Miller is the recipient of a TS-SIS Grant to attend the conference. Tina is Technical Services Librarian at the John F. Kennedy University Law Library.
- Karen Wahl is the recipient of a TS-SIS Grant to attend the conference. Karen is Catalog Librarian at the Fordham University Law Library.

Ellen also reported that the Renee D. Chapman Memorial Award for Outstanding Contributions in Technical Services Law Librarianship was given this year to Mary Jane Kelsey, the Associate Director for Technical Services at the Lillian Goldman Library, Yale Law School.

Remarks by Blair Kauffman, Director of the Lillian Goldman Library, Yale Law School: Blair Kauffman congratulated Mary Jane on her award and spoke about her fearlessness in trying and experimenting with new ideas in technology, her willingness to share her knowledge with colleagues, and her consistent sense of humor.

Response by Mary Jane Kelsey: Mary Jane said that she is honored to be given an award that keeps the memory of Renee Chapman alive. She said that she feels intimidated to be included in the roster of great librarians who received this award before. She thinks that Technical Services is a great field to work in, that she is indebted to all her colleagues for this award, and that it is great to work for a Director who always supports new ideas. Mary Jane thanked everyone very much.

Introduction of TS-SIS VIP

Rhonda Lawrence introduced the TS-SIS VIP (Very Important Person)–Karen Wahl. Rhonda said that this year VIP was selected on the basis of her application and letters of reference. While considering these documents, it was decided that Karen represents exactly the kind of new technical services librarian that we want to nurture and encourage.

Other SIS Activity Reports

Duplicate Exchange: Bonnie Geldmacher reported that the 2006/07 serials exchange of duplicates took place in December 2006 and in June 2007. Forty-two libraries participated, which is a decrease of 6 libraries from last year. Of the 42 participating libraries, 37 submitted a list of duplicates to include in the exchange. The total number of issues offered in the fall was 9,649. The total number of issues offered in the spring was 12,003. One improvement made this year was additional download links to the master list. The master list was available online, in PDF format, and in Excel format. A secondary list, comprised of titles not in the authority list, was also available online and in PDF format.

Education Committee: Rhonda reported that she had already folded the 2006/07 Education Committee report into her chair report, which will be on the web. She made a call to the membership to fill out evaluation forms for the programs at the current meeting because they help the Education Committee a great deal in selecting programs for the future meetings.

Joint Research Grant: Nancy Poehlmann was absent. Her report is on the web site.

Nominating Committee: Rhonda announced that Reggie Wallen, chair of the committee, has left law librarianship. Her report is on the web.

Membership Committee: Craig Lelansky reported for Jeffrey Bowen. He said that the list of new members was not sent to the Membership Committee this year. Therefore, no welcome packet has been sent as of June 20. The report mentions that Craig Lelansky revised the volunteer request form and worked closely with Alan Keely and Martin Wisneski to get the revised form posted on the website. He did a good job and got it done quickly and deserves recognition for his work. Another accomplishment of the Committee is that a flyer was created announcing the Marla J. Schwartz grant now offered by TS-SIS. This flyer is available at the TS-SIS activities table at the meeting and at the web site.

Rhonda noted that this year was the first full year of the Membership Committee, and they are doing an important job.

Online Discussion List ts-sis@aallnet.org: Rhonda said that Mira Greene, the discussion list manager, is not attending the meeting this year. Rhonda stressed that Mira is managing not one list but several for every special group, and that she is doing a great job.

Website: Martin Wisneski reported that the web site was redesigned a year ago, that profiles of long-time TS-SIS members were placed on the Section History page. The PowerPoint version of the profiles was created in time for the Centennial 2006 AALL annual meeting and later converted to web format. Martin mentioned that currently he is working on implementing the web site's search engine. He thanked Rhonda for her continuous supply of content for the web site (laughter).

Reports from AALL Representatives

ALCTS CC:DA liaison: Kathy Winzer invited everybody to attend the Program and Cataloging Roundtable on Resource Description and Access.

MARBI liaison: George Prager reported that the most significant MARC 21 developments in the last year are the following:

- Incorporating Invalid Former Headings in 4XX fields of the MARC 21 Authority Format
- Addition of Linking ISSNs to MARC 21 Bibliographic field 022
- Changes for the German and Austrian conversion to MARC 21
- Considering a new field for data elements needed to ascertain copyright facts

ALCTS Subject Analysis Committee (SAC) liaison: Yael Mandelstam said that the Subject Analysis Committee (SAC) and its subcommittees focused mainly on the future of subject headings, the development of genre/form headings, and the application of faceted subject terminology. To hear more about this work Yael invited everybody to come to the Cataloging and Classification Standing Committee Meeting.

Certificates of Appreciation

Rhonda presented a certificate of appreciation to Pat Turpening in recognition of her many years of outstanding work as the chair of the Preservation Committee. She also presented a certificate to Brian Striman for his work as editor of *TSLL*. Rhonda called Brian a dedicated editor of one of the best volunteer publications in librarianship.

***TSLL* Report**

Brian Striman said that *TSLL* is a jointly sponsored publication – by TS-SIS and OBS-SIS. Representatives of both sections are on the *TSLL* Board. Brian especially acknowledged the work of Julie Stauffer and Cindy May, as well as contributing editors. He said that he will strive to avoid combined issues in the future. For that purpose, he instituted a *TSLL* organizational email account, which should help to resolve future delays. The RSS feeds are planned to be set up on the *TSLL* web page.

LC Representative Report

1. Survival of LCSH

Jolande Goldberg reported that the LC Acquisitions and Bibliographic Access Directorate Management Team endorsed the LC Cataloging Policy & Support Office (CPSO) recommendation that the Library of Congress continue to apply precoordinated subject headings. Jolande advised to watch for further developments in this area on the CPSO web site

Jolande noted that the TS-SIS Inherently Legal Subject Heading (ILSH) Task Force had agreed to broaden its charge by completing the analysis of the compiled legal headings. For this purpose it formed an interesting partnership with the LC FAST (Faceted Application of Subject Terminology) team.

2. A new approach for genre/form terms

Jolande reported that the LC Cataloging Policy and Support Office (CPSO) continues to work toward adding genre/form authority headings for moving images to *Library of Congress Subject Headings* (LCSH) and toward implementing MARC 21 fields 155 and 655. Additional subject headings (for musical works) will be added as guidelines and workflow issues are resolved. As a contribution to this LC project, the TS-SIS Classification and Subject Cataloging Policy Advisory Working Group is already evaluating the legal genre headings list. The starting point for that was Bill Benemann's thesaurus *Genre Terms for Law Materials*, published in the AALL Publications Series (William S. Hein & Co.). Jolande said that she urged Bill Benemann to clarify the copyright situation associated with the use of his thesaurus. Bill already followed up with Hein clearing the copyright question.

3. Revision of the Form Division Table KF1

Jolande noted that the Marie Whited's proposal on the revision of the Form Division table KF1 of Class KF (Law of the United States) had been posted on the TS-SIS e-list for public comment, and then posted on the TS website to prepare in advance for a brief discussion and vote at the Cataloging and Classification Committee meeting tomorrow. Jolande said that this constitutes the first attempt to revise 40 original Form division tables for Class KF published in 1967

2006/07 Vice Chair/Chair-Elect Report

Alan Keely thanked everybody who participated in this year's survey. The return rate was a record 33 %. He also said that the work of the 2007/08 Education Committee has been ongoing for quite some time now in preparation for the next annual meeting in Portland. Alan called for more active participation of the membership in this work.

New Business

Passing of the "gavel": Rhonda remarked that it had been her pleasure to serve as the TS-SIS Chair. Alan said that it is going to be a great year, and that he is looking forward to working as a Chair. Alan presented Rhonda with a plaque on behalf of all members of the TS-SIS Executive Board. He said that Rhonda was the person who worked harder than anybody else past year.

Meeting adjourned.

*Respectfully submitted,
Sima Mirkin
Secretary/Treasurer*

Technical Services Special Interest Section Acquisitions Committee

MINUTES

The meeting was called to order on Monday July 16, 2007 at 7:30 AM at the Ernest N. Morial Convention Center Room 205 by Ajaye Bloomstone, Acquisitions Librarian, Louisiana State University Paul M. Hebert Law Center Library.

Attendees: Shyama Agrawal, Lisa Arm, Heather Buckwalter, Sue Burkhart, Vicky Coulter, Bonnie Geldmacher, Andrea Howard, Earlene Kuester, Paul Mastrangelo, Mary McKee, Jim Mumm, Cynthia Myers, Sharon Nelson, Eric Parker, Glenn Risolo, Anne Robbins, H.C. Singh, Julie Stauffer, Dick Vaughan, and Chair, Ajaye Bloomstone.

The meeting began at approximately 7:30 a.m. The introduction of attendees was done all around. The 2006 minutes of the Committee were approved.

Old Business:

The Acquisitions Workshop: "Delivering the Goods: Effective and Efficient Acquisitions Processes" took place on Saturday, July 14 in the Convention Center. It elicited good reviews, both for the quality of the presentations and the number of attendees. The attendee quota was filled before the end of early bird registration. Ten more slots were opened and these were also filled. This is a good indication that another workshop can be offered every two to three years. It was mentioned that the attendees were mostly experienced acquisitions librarians. The content of future workshops was discussed and suggestions included management issues and electronic resources management.

Other acquisitions programs during the conference include Anne Robbins' and Emerita Cuesta's presentations entitled "Tips and Tricks for Successful Vendor Negotiations," which will be held on Tuesday, July 17 before the Acquisitions Roundtable. Lisa Arm moderated a program on Sunday July 15 entitled "Blogging and Beyond: New Communication Streams for Technical Services Librarians." Bonnie Shucha of Wisblog presented the program, which was well received.

Ajaye spoke with Eleanor Cook of *ACQWEB*, who asked if the Committee would be willing to work with *ACQWEB* on a legal vendors' list. Anne Robbins and Lisa Arm have volunteered to chair a committee and Ajaye would like to make it a permanent committee. A draft of an AcquWeb Wiki template proposal was passed around. Comments are needed and should be sent to the AcquWeb board. *ACQWEB* is housed at Appalachian State University and doesn't want to be affiliated with ALA. Ajaye suggested the same arrangement with AALL, in order to maintain our independence. General discussion took place and most thought the Wiki was a great idea. Anne Robbins suggested that every field be searchable. Keeping

it up-to-date will be a big job. Ajaye asked volunteers to contact Anne or Lisa and also that comments on the template be sent to them by the end of July. When the site is available, the Acquisitions Committee will have the password and there will be a link from the TS-SIS page and also the Acquisitions Committee page.

The consolidation of collection development policies with ALL-SIS was discussed. Martin Wisneski can link the ALL-SIS website to our page. Eric Parker volunteered to work with ALL-SIS on this.

New Business:

Ajaye shared her remembrances of Cynthia Aninao, the Acquisitions Librarian at the University of Cincinnati Law Library, who passed away in February 2007. Cynthia started the *LAWACQ* website and maintained it from 1985 to 2005. She also mentored many new acquisitions librarians.

Acquisitions programs for AALL 2008 can be submitted electronically to the TS-SIS Education Board. The board will rank the programs and submit the best to the AMPC. Those that are not accepted can be submitted on a division level. Some suggested program ideas were the many aspects of electronic resource management, such as usage statistics, patron usage and licensing. Another suggestion dealt with library problems, such as space and renovation issues.

The meeting was adjourned.

*Respectfully submitted by
Earlene Kuester
Stetson University College of Law*

**Technical Services Special Interest Section
Acquisitions Roundtable**

MINUTES

The meeting was called to order on Tuesday, July 17, 2007 at 12:00 PM at the Hilton New Orleans Riverside Hotel by Ajaye Bloomstone, Acquisitions Librarian, Louisiana State University Paul M. Hebert Law Center Library.

Attendees: Janet Accardo, Elaine Apostola, Lisa Arm, Lauren Bardgett, Pam Brannon, Elizabeth Breakstone, Jennifer Creevy, Emerita Cuesta, Joan Englander, Cecily Giardina, Ismael Gullon, Gail Hartzell, Byron Hill, Earlene Kuester, Paul Mastrangelo, Mary McKee, Lynn Monkres, Jim Mumm, Sharon Nelson, Marilyn Nicely, Nuchine Nobari, Eric Parker, Anne Robbins, H.C. Singh, Kerry Skinner, Julie Stauffer, Elisabeth Umpleby, Dick Vaughan and Ajaye Bloomstone.

First on the agenda was a program entitled "Tips and Tricks for Successful Vendor Negotiation" presented by Anne Robbins and Emerita Cuesta. Anne's portion was called "Things I Wish I Had Known in the Beginning." She stressed knowing your vendor, the importance of consistency in dealing with vendors, communication with them and online account management tools. Emerita Cuesta talked about her experiences with Latin American vendors. She talked about the problems and her own particular rules for dealing with them. She also passed out a list of Latin American vendors.

The Roundtable discussion began at 12:30 p.m. with introduction of attendees all around. The 2006 Roundtable minutes were approved.

Ajaye talked about her remembrances of Cynthia Aninao, the Acquisitions Librarian at the University of Cincinnati Law Library, who passed away in February 2007.

Acquisitions program proposals for 2008 can be emailed to Ajaye, and she will take them to the Education Committee. They need to be in by August 3, if they are to be co-sponsored by the TS-SIS.

Ajaye brought up a problem at her library with Oceana and their print-on-demand system. She cancelled 30 loose-leaf titles several years ago. They were reinstated recently through the print-on-demand system. After manufacturer's delays, the volumes were finally received, but two-thirds of the binders were damaged. She has spoken with Oxford, who is dealing with the manufacturer.

Lisa Arm asked about user statistics from BNA; they are apparently not available yet. Ajaye mentioned that HeinOnline user statistics should be available in fall 2007. Hein and BNA are smaller publishers, so technology is not their major focus. Hein is still using BISAC instead of EDIFACT. Emerita Cuesta has discovered a problem with Hein subscriptions. Vendors are

calling directly saying that Hein has not renewed their subscriptions. Hein is apparently holding the money for the “float” period. Other problems also arise at Hein when someone calls or emails one person, but receives a reply from someone else. Ismael Gullon suggested emailing Shannon Hein directly.

Marilyn Nicely’s library (U. of Oklahoma) is looking for a new ILS. They presently have Sirsi, but they can’t get fund reports from it. The University has stopped upgrading it. Many people recommended Innovative Interfaces Millennium. It is a flexible system and there is a Law Users Group meeting held every year at AALL.

Sharon Nelson mentioned subscriptions with print and online access by password only. There is no IP addressing. Emerita offered that if a professor wants a subscription, you can give them the passwords. The advice is to stay away from passwords-only. Tell the publisher that you will subscribe, only if they have IP addressing.

Eric Parker asked about electronic invoices from West. Emerita said they are available in My Account and can be paid online and you can also pay line items. You receive a paper copy, there is no EDIFACT. Ajaye reinstated some West publications and the posting numbers didn’t match those on the reconciliation report. She couldn’t get an answer from West. Sharon Nelson asked about the WestPac agreement and said they were double-billed for WestPac titles.

Ajaye shared that at ALA, instead of having separate Technical Services roundtables, there was a session entitled “Creative Issues in Technical Services.” There were eight tables of different topics discussion for 50 minutes. During the last ten minutes, each table reported on its discussion. Email Ajaye if you are interested in this idea. She had problems getting to all the roundtable discussions she wanted to attend here at AALL. She would have liked to know what topics were discussed.

The meeting was adjourned.

*Respectfully submitted by
Earlene Kuester
Stetson University College of Law*

Technical Services Special Interest Section Awards Committee Report, July 15, 2007

*Submitted by Ellen McGrath
Chair, TS Awards Committee*

The members of the Awards Committee are:

Kevin Butterfield, Larry Dershem, Leanne Hillery, Marvin Lewis, and Chair, Ellen McGrath

The Awards Committee publicized the call for nominations for the Renee D. Chapman Memorial Award for Outstanding Contributions in Technical Services Law Librarianship, which were due February 1, 2007. We then reviewed the nominations and chose Mary Jane Kelsey (Lillian Goldman Law Library, Yale Law School) as the 2007 recipient.

The call for applications for the TS Educational Grants had a deadline of April 20, 2007. A number were received and the following grants were given:

- **Sean Chen** is the recipient of the first TS-SIS Marla Schwartz Grant to support his attendance at “The Future Is Digital: Metadata Standards and Applications” workshop. Sean is Cataloging Assistant at the Duke Law School Library and also a student in the MLS program at the University of North Carolina at Chapel Hill.
- **Edward Hart** is the recipient of a TS-SIS Grant to attend the “Delivering the Goods: Effective and Efficient Acquisitions Processes” workshop. Ed is Acquisitions and Serials Librarian at the University of Florida.
- **Tina Miller** is the recipient of a TS-SIS Grant to attend the conference. Tina is Technical Services Librarian at the John F. Kennedy University Law Library.
- **Karen Wahl** is the recipient of a TS-SIS Grant to attend the conference. Karen is Catalog Librarian at the Fordham University Law Library.

The Committee also assisted in revising parts of the TS Handbook and website that deal with the TS Educational Grants.

Technical Services Special Interest Section Cataloging and Classification Standing Committee Meeting

Jean Pajerek called the meeting to order at 8:45 a.m. July 16, 2007 in the Magnolia Room of the Hilton in New Orleans, LA.

Announcements

The meeting began with announcements from the chair, Jean Pajerek. Announcements included an update on the TS-SIS Hot Topic program (a report from Richard Amelung, AALL representative to the LC Working Group on the Future of Bibliographic Control; handout is available for download at <http://www.aallnet.org/sis/tssis/annualmeeting/2007/programdescriptions.htm#hottopic>), and a request from the Serials Committee asking for people who use SUSHI to track electronic usage statistics. New members were solicited for the various task groups and meeting times for the task groups were announced. Those with program ideas for next year's AALL meeting were encouraged to submit them to the TS-SIS Education Committee.

Representatives' reports

Yael Mandelstam, the AALL liaison to the ALA Association for Library Collections and Technical Services (ALCTS) Cataloging and Classification Section (CCS) Subject Analysis Committee (SAC), presented her report, available online at <http://www.aallnet.org/sis/tssis/representatives/2007/sac2007.htm>. One highlight of particular interest to law catalogers: the headings **Insanity** and **Insanity–Jurisprudence** were cancelled in favor of **Insanity (Law)** and **Insanity defense**. The existing heading **Insane**, which had only been used in combination with legal subdivisions, was cancelled in favor of using **Mentally III** in all situations. Yael also reported on the activities of the Task Force on Inherently Legal Subject Headings at <http://www.aallnet.org/sis/tssis/committees/cataloging/legalheadings/200707report.htm>.

George Prager, AALL liaison to ALA's Machine-Readable Bibliographic Information (MARBI) Committee, presented his report, which is available online at <http://www.aallnet.org/sis/tssis/representatives/2007/marbi2007.pdf>. Highlights of MARBI's activities include the incorporation of invalid former headings in 4xx fields of the MARC Authority Format to facilitate the correction of headings. A new value 'h' (Do not display) has been defined for subfield \$w/1 in 4XX fields. Subfield \$w/2 will use either of the two existing applicable values:

'e' for earlier established form of heading (national authority file), or

'o' for earlier established form of heading (other authority file).

Kathy Winzer, AALL representative to ALCTS's Cataloging and Classification Section: Description and Access (CC:DA) Committee, presented her report. CC:DA's activities centered on the continued development of *RDA—Resource Description and Access (RDA)* and related documents. Kathy's complete report is available online at <http://www.aallnet.org/sis/tssis/representatives/2007/ccda2007.htm>.

Task Group Reports

Terri Saye, chair of the Task Group on Standards for Vendor-Supplied Bibliographic Records, outlined the objectives of the task group and the progress made so far towards achieving them. Terri's report is available online at <http://www.aallnet.org/sis/tssis/committees/cataloging/vendorbibrecords/annualreport/2007.htm>. Those interested in the work of this task group were invited to attend the group's meeting. The group's charge and membership roster can be viewed online at <http://www.aallnet.org/sis/tssis/committees/cataloging/vendorbibrecords/>.

Ann Sitkin, chair of the Descriptive Cataloging Policy Advisory Working Group, presented her group's report. The group spent the last year reviewing draft chapters of *RDA* and providing feedback and recommendations for Kathy Winzer to take back to CC:DA on behalf of the law library community. During the past year, the group reviewed the drafts of chapters 3—Carrier, 6—Persons, Families, and Corporate Bodies Associated with a Resource, and 7—Related Resources. Chapter 6 includes rules for legal access points, including primary access points for treaties, and for annotated editions and commentaries of laws and administrative regulations. Those in attendance were reminded to attend the *RDA* panel discussion taking place on Tuesday, July 17.

Ellen McGrath presented the report of the Classification and Subject Cataloging Policy Advisory Working Group (available online at <http://www.aallnet.org/sis/tssis/committees/cataloging/classification/annualreport/2007.htm>.) Ellen updated the Committee on the working group's two projects for the past year. One project was an update of Bill Benemann's *Genre*

Terms for Law Materials. This project was undertaken at the request of AALL's SAC representative, Yael Mandelstam, as a contribution to LC's project to establish genre terms for Library of Congress Subject Headings (LCSH). The second project was to review and comment on Marie Whited's draft revision of the KF1 form table. After presenting her report, Ellen opened the floor to discussion of the draft revision of the KF1 table. After the discussion, the group voted in favor of the revisions.

Jolande Goldberg presented a brief update from the Library of Congress. Jolande reassured the Committee that LC is not planning to abandon the LCSH. She is involved in an effort to enhance the usefulness of the LC classification schedules as an online tool by adding links to external resources from within the schedules. Jolande reminded those in attendance to attend her program on LC's Classification Web and the Law of Indigenous Peoples in the Americas (KIA-KIX) to see this project in action. Handouts from this program are available online at <http://www.aallnet.org/sis/tssis/annualmeeting/2007/programdescriptions.htm#indigenous>.

The meeting was adjourned by Jean Pajerek at 10:08 a.m.

*Minutes taken and submitted by
Sara S. Repinski
Coleman Karesh Law Library
University of South Carolina School of Law.*

Technical Services Special Interest Section Cataloging and Classification Roundtable

*Reported by Susan Vossberg
Hamline University Law Library*

RDA—Resource Description and Access: Midyear Update for Law Catalogers

Presented by Kathy Winzer, AALL representative to CC:DA, and heavily involved in the development of RDA

Kathy was introduced by Ann Sitkin of Harvard, chair of the Descriptive Cataloging Policy Advisory Working Group. The main objective of Kathy's presentation was to discuss the changes made to RDA in chapters 3, 6, and 7.

Changes to chapter 3 ("Carrier") include the following:

- In October 2006 the Joint Steering Committee decided that instead of no abbreviations being used at all in the RDA extent element, that abbreviations can be used in units of measure, and all recording will be done in metrics. (e.g., DVDs will be identified as 12 cm.)
- An example of no abbreviations: "100 p. in various pagings" will instead be: "100 pages in various paginations."
- Also, s.l. and s.n. are being replaced with "Place not identified" and "Publisher not identified," respectively, and "online resource" can be the carrier type for all online resources.

Changes to chapter 6 ("Persons, Families, and Corporate Bodies Associated with a Resource") include the following:

- The rule of 3 will no longer be used. All authors, etc. can be listed in a bibliographic record.
- The creator is the highest level access point, and is required, but contributors as access points are now optional.
- "Required if applicable" is gone. The logic is that if something is not on an item, it cannot be required.
- Principal access points have been moved to chapter 13.
- All access points in legal works are now optional.
- Present court proceedings rules say that only the name of the main person being prosecuted is the access point, but this rule will be looked at further to determine if there should be access points for all persons that are being prosecuted.
- Access points from opinions of judges is also under review.

Changes to chapter 7 ("Related Resources") include the following:

- Chapter 7 got a lot of comments from the audience because the rules seem confusing and difficult to understand
- An example of a structured description:
Facsimile of: 2nd ed., rev. – London: Routledge, 1877
- An example of an unstructured description:
Harold C. Conklin's map manuscripts...are held at Yale University Library
- An example of a structured description of a source work or expression:
Revised edition of: Biology of fishes / Carl Bond. – 2nd ed. – 1966.

-
- An example of an unstructured description of a source work or expression:
Revised and shortened version of the author's thesis (Ph. D.) – Yale University, 1982.

Kathy stressed that RDA is still a work in progress so all changes are drafts at this point, and none of the rules written for RDA is being used yet. The Joint Steering Committee has several URLs that AALL members can access to see how RDA is progressing. Kathy encouraged all members to look at the sites and to look for clarity and consistency in procedures and changes. She charged all members with the responsibility to send comments, concerns, etc. to her. She then puts these changes in the CC:DA wiki for all CC:DA members to look at, and then forward their recommendations on to the Joint Steering Committee.

RDA drafts at <http://www.collectionscanada.ca/jsc/rda.html>

RDA discussion list at <http://www.collectionscanada.ca/jsc/rdadiscuss.html>

CC:DA at <http://www.ala.org/ala/alctscontent/catalogingsection/catcommittees/ccda/ccda.htm>

Kathy's email address: kwinzer@stanford.edu

Power Point slides from this program are available online at <http://www.aallnet.org/sis/tssis/annualmeeting/2007/handouts/rda-sitkin-handout.pdf>

Technical Services Special Interest Section Classification and Subject Cataloging Policy Advisory Working Group Meeting

*Reported by Denise Glynn
DePaul University, Rinn Law Library*

Ellen McGrath (Acting Chair), with 32 in attendance.

Announcements

Yael Mandelstam asked for volunteers to assist her in cleaning up FAST headings. There are approximately 800 headings left to clean up.

SAC and PCC have combined to design a classification workshop. Yael Mandelstam is looking into the possibility of customizing the SAC/PCC training material to formulate a two-day workshop for law classification.

Review of KF1 form table

Earlier in the day at the TS-SIS Cataloging and Classification Standing Committee meeting, there was a brief discussion of the KF1 form table proposal. That discussion is summarized here. The majority of members were thrilled with the changes, as evidenced by a show of hands in favor of the proposal by Marie Whited. All in attendance had been able to review the cover memo, revised KF1 form table proposal, and previous comments in advance on the TS website. These additional comments were expressed:

- Casebooks (18): A previous comment about discontinuing the separate number for casebooks appeared in the compiled comments document on the TS website. Pat Sayre McCoy said that the University of Chicago Law Library buys a lot of casebooks and would miss the casebook cutter. When asked if anyone else felt strongly about this, nobody spoke.
- Loose-leaf services (15): It was suggested that "services" be emphasized and/or defined in the table in order to avoid the possibility of applying this form to treatises in loose-leaf format in error.
- Deletion of trailing zeroes (6.6<date>): Yael Mandelstam requested an explanation of the rationale behind the concept of deleting the trailing zeroes from a date/year of original enactment or total revision of a particular act when it is used to construct a number. While it was recognized that this was not a new concept, it was mentioned that this could cause some confusion with some years in the future.

Genre Terms

Jolande Goldberg first addressed the group on genre terms. She reminded everyone of the genre information available on the CPSO website at <http://www.loc.gov/catdir/cpso/genre.html>. The plan is to establish authority records for each genre/form heading in field 155 which would correspond to 655 in the bibliographic record. There will be no more form subdivisions (subfield v) in field 150/650.

Jolande gave the following guidelines for creating form/genre terms for law materials:

- Start with inherently legal terms or general terms that can be made legal by adding the words "law" or "legal" (e.g. change

Periodicals into Legal periodicals).

- In order to expand the list with more legal terms, we could look at earlier K form division tables.
- Some current 150 headings are used as both topical and form headings. Jolande confirmed the need to update the scope notes in the 150 authority records once the corresponding 155 genre terms are established.

Yael Mandelstam and Martin Wisneski will set up a wiki so CSCP members and anyone else interested can add their comments to the workings of the Group. Yael will draft a set of rules for use of the wiki.

There is a timeline for adding the form/genre headings to the authority file. As part of a pilot project, September 3, 2007 is the target date for the addition of the first 155 form/genre headings for music and moving images. Late November 2007 will be the rough target date for adding a select group of law headings. Yael said that roughly half of the form/genre terms on the existing list by Bill Benemann are not legal and will need to be “made legal” when possible. Once the law genre headings are fine-tuned and approved by CPSO, we will feed headings to LC via SACO.

Yael Mandelstam confirmed with Janis Young at LC, the wording for scope notes in the form/genre authority records: the correct wording will be “Here are entered ...”

Jolande Goldberg also spoke briefly on subject headings initiatives at LC. She referred members to the CPSO website for more information on these topics:

- LCSH and pre-coordination will remain, but simplification quest continues.
- Experimenting with social tagging.
- Possibility exists of linking genre authority records to the classification form tables; would require harmonization of form tables.
- Experimenting with allowing computer to generate cutters; result has been some triple cutters that are now allowed.
- Change of LCSH to *Insanity (Law)* necessitates cleanup of related LCSH.
- Looking into changes to Ecclesiastical law.

Jolande also mentioned that there are 483 Native American Indian titles now available in LLMC Digital. In addition, the pre-1917 Congressional Hearings are now available on the LC website.

Technical Services Special Interest Section Managers Issues Roundtable

*Reported by Elisabeth Umpleby
University of Connecticut Law School Library*

Discussion at the roundtable focused on three major themes.

Impact of FMLA (Family and Medical Leave Act)

Some tasks won't get done when a staff member utilizes FMLA. A decision must be made to scale back work until the staff member returns. One possible solution would be to request more student time for routine matters. Staff money can be freed up to rely on students, or possibly on short-term employees. Openness about the problem and staff shortage can generate support and good will, and could avoid resentment in an unfair work environment.

Modeling the roundtable format after ALA

One option is to have specific issues discussed at separate tables. Each table could later report to the entire room on what was discussed. Prior to the roundtable meeting, topics under consideration could be shared in an email so that participants could be prepared in advance.

Workflow issues

- Students are being used to check in law journals and law reviews. Some libraries have cancelled advance sheets, and some no longer check them in.
- Gifts and government documents go straight to cataloging, instead of stopping in Acquisitions.
- Casebooks are not bought for every class. Some libraries have discontinued the practice of purchasing both nutshells and hornbooks.

Technical Services Special Interest Section New Catalogers Roundtable

*Reported by Susan P. Morrison
Law Library, Paul M. Hebert Law Center
Louisiana State University*

The Roundtable met Saturday, July 14, at the Hilton New Orleans Riverside, attended by a heartening number of new catalogers. Melody Lembke of the Los Angeles County Law Library offered her insight into the idiosyncracies and challenges of law cataloging.

A recurring theme in Ms. Lembke's remarks was the necessity of answering the question "What is this thing?" This question must be answered first, or quality cataloging is impossible. Although it seems a simple enough process, these days the question can be difficult to answer. Is the piece an integrating resource, or simply a treatise housed in a binder? Is the item to be cataloged a serial, a digest, a law report? Catalogers must be able to distinguish between a true code and items such as administrative codes, which are really regulations. Resolving the ambiguity of the nature of many law materials is the first hurdle in law cataloging.

Other topics of discussion included the array of formats currently being produced and its effect on cataloging. Many loose-leaf titles are now being issued as annuals, which entails recataloging the piece. Maintaining a law title over time is also part of the cataloger's job. Another format change affecting catalogers is, of course, the prevalence of electronic formats. Mixed format materials such as books with CD-ROM are now commonplace and databases and websites offer new cataloging challenges.

Ms. Lembke urged us to always consider how the material being cataloged fits into our collection as a whole and to keep in mind that the purpose of cataloging materials is to make it easily available to our users. She reminded us also that our first customer is the staff of the library.

The New Catalogers Roundtable is a valuable resource for many of us, particularly those of us who may be the only cataloger on staff. It offers us the opportunity to network with our fellow catalogers and to feel less isolated in our positions. I hope that this program will continue at our annual meeting and eventually the catalogers who attended this year as new catalogers will become mentors to those who join our ranks in the future.

Technical Services Special Interest Section Preservation and Binding Roundtable

*Reported by Pat Turpening
Booklover Consulting*

The speaker at the roundtable was Sharman B. Smith, the Executive Director of the Mississippi Library Commission, and one of the frontline responders to the library emergencies in her state in the days, weeks, and months following Hurricane Katrina. She spoke on "Observations from Ground Zero: Lessons Learned from Katrina."

Ms. Smith has synthesized her observations of the tragedy that destroyed a large part of the libraries under her purview into four areas: (1) imagine your worst nightmare; (2) be a player; (3) get real; and (4) take charge. Since the devastation and scope of Katrina have redefined natural disasters, Ms. Smith stressed that it is necessary for librarians to redefine disaster planning. The plans we have been writing for years make assumptions such as that you will be able to count on staff members, resources, and outside assistance. You cannot assume any of these will be available for reconstruction.

"Imagine your worst nightmare" by picturing a world with no communications (cell phone towers are down), no infrastructure (e.g., electricity, water, fire trucks, ambulances), no access to libraries (buildings may be unstable and closed by authorities), no staff (they may have relocated or they could be in the hospital), no resources (e.g., toilets, ATMs, banks), and widespread damage across your town or city. In other words, it is a different world entirely. Though this sounds like an ominous scene from a screenwriter's imagination, we all know that this describes the aftermath of Katrina. In Mississippi alone, 59 libraries were destroyed or heavily damaged.

"Be a player" refers to actions to be taken before a disaster occurs. These are the actions we have all seen on disaster planning lists for years (and possibly ignored?), but they have taken on extreme significance in our post-Katrina world.

- Librarians need to be involved in, or instrumental in forming, **disaster planning groups in their larger institutions**. This will help to ensure that your particular needs are made known and not forgotten in times of crisis.

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- Those who have **established relationships with facilities with freeze driers and dehumidifiers** will have priority over everyone else as they slowly realize what they need. All of us in institutions with cultural materials have a responsibility to care for them, especially in times of crisis.
 - Library directors with governing boards need **signed letters giving authority** to spend money and to make decisions. With Katrina, board members spread to the winds and directors without pre-emergency authority were at a loss to take care of their libraries. Their hands were tied until they could track down every one of their Board members.

“Get real” has to do with the time during, and immediately after a major disaster. You have to be cognizant of the overall situation in your entire community and, in doing so, you may decide to yield the libraries’ needs to those with more immediate and pressing needs, particularly if your library sustained little or no damage.

- Allow sufficient time to assess your situation; **do not make hasty decisions** you may regret,
- Several phone numbers and **physical addresses are needed** for every staff member in the event they had to relocate. Encourage them to provide an out-of-state contact,
- Cut yourself some slack and **cut your staff some slack**. You are all dealing as best you can with unbelievable challenges and you will be under unremitting stress. Encourage each other to take breaks.
- Priorities for salvage decided before your tragedy may need to be changed. If a priority collections turns out to be unsalvageable, move on to another priority; **don’t spin your wheels over things that can’t be fixed**. Other than rare books and archives, most books [*and non-print media*] can be replaced. [*Italicized words added by this reporter*]

“Take charge” means you become part of the solution. Speak with authority, but also listen and learn about the big picture. Insisting that the library is the most important entity may not get you far, but working as a team member to work out how the law school, law firm, or court will reestablish functions should work to everyone’s benefit. Take advantage of offers of help from colleagues. One staff member could be assigned to coordinate such requests.

Ms. Smith pointed out an interesting positive aspect to a large library disaster. See this time as an opportunity to rethink your operations, collections, and staffing. There are few times in any institution’s lifespan when such an assessment can be made and carried out.

Look for and act on every positive thing you can. Good luck in your disasters, but since you can’t count on luck, start planning now!

Technical Services Special Interest Section Serials Standing Committee Meeting

MINUTES

The meeting was called to order by TS-SIS Serials Standing Committee Chair, Carol Avery Nicholson.

Announcements

Three TS SIS sponsored 2007 AALL programs would be held after the TS SIS Serials meeting. They were: Indigenous Government and Law in the Americas, The Future of Cataloging and Casting a Wider Net.. Members were encouraged to attend these.

Pat Sayre-McCoy had forms at the meeting for anyone who wanted to suggest a program for AALL 2008.

Reports

Project Counter Task Group: Pam Deemer reported on Project COUNTER (Counting Online Usage of Networked Electronic Resources). Project COUNTER involves the creation of standards to which vendors and libraries should comply in order to enable libraries to pull usage statistics for electronic resources. SUSHI (Standardized Usage Statistics Harvesting Initiative), a protocol that enables COUNTER compliant reports to be exchanged automatically between computer systems, is also being investigated. The Task Force is writing a best practices letter for the vendors and is hoping to mail that out in August 2007. A survey was sent to several lists to find out which law libraries may be keeping track of usage statistics, in particular, COUNTER compliant statistics. Response was low, and the survey may be resent. Also in the works is a program discussing COUNTER, SUSHI and electronic resources. The Task Group also is developing an informational web site to link from the TS-SIS Serials web site and a bibliography of articles dealing with COUNTER and SUSHI.

ABA Questionnaire: Carol Avery Nicholson explained the revisions to the ABA Questionnaire. The most significant changes

are the way libraries count electronic titles and databases and those volumes will no longer be counted in 2 years. Two years ago, the committee dropped the electronic title count from the survey. That will be back in 2007. Libraries will only be able to count titles they own, not those they have access to. In addition, they can count a title in different formats in various categories but can only count it once if they have multiple copies of it in the same format. The committee will have an FAQ up by Aug. 15, including a list of historical titles and how to count them.

Exchange of Duplicates: Bonnie Geldmacher reported that 42 libraries participated in the exchange (6 less than last year) of 12,003 issues. This is the first year it was held twice, which was received favorably by those participating. ABA Journal and Harvard Law Review were the most frequently offered titles.

Old Business

Exchange of Duplicates: Bonnie Geldmacher wondered how she could publicize the exchange program. Some suggestions included emailing all members of the TS SIS, the Needs & Offers group, and the Executive Board - asking them to forward announcements to groups to which Bonnie does not have access.

New Business

2008 Annual Meeting Program Proposals: Some suggestions included a basic cataloging program and a CONSER serials program. There was some discussion that these topics would be included in a continuing education program that would be held outside of the Annual Meeting, possibly being held as a webcast. Some other program suggestions included a basic cataloging program, a program on serials standards (Thinking Outside the Box by Holly White), Project COUNTER and Amazing Technical Services, a half day workshop intended for directors and Heads of Technical Services to help them understand what we can do for them. Program suggestion deadline is August 3. The TS Education Committee will respond to all suggestions by August 9.

Other Business

Carol wondered what the group thought about changing our name from TS-SIS Serials Committee to TS-SIS Continuing Resources Committee. A similar change recently was announced by the Association for Library Collections & Technical Services. The group thought this was a good idea and would more accurately reflect the focus of the committee.

Meeting adjourned.

Respectfully submitted
Vicky Coulter

Technical Services Special Interest Section Task Force on Vendor-Supplied Records Report

MINUTES

Terri Saye convened the meeting and began with introductions around the table. The Task Force charges and group membership were reviewed. There was general agreement that that not much work had been accomplished on charge 1: Develop guidelines for vendors to assist them in following PCC's MARC Record Guide for Monograph Aggregator Vendors. More work had been accomplished on charge 2: Offer to assist vendors who wish to produce cataloging metadata, by: (a) encouraging them to provide sample bibliographic records for evaluation; (b) assist vendors in preparation of specifications for contract cataloging; and (c) recommend changes and revisions as appropriate (list illustrative, not prescriptive).

Yael reported that she and others had viewed records from Cassidy. We had a good experience with them, the main issue was authority control. Cassidy cleaned up the file in a short time.

Other vendor records were discussed as follows: MOML records – these were derived from the microfiche records; the original OCLC record number is in the 001, which can create overlay problems; no authority control; Cassidy is still producing parts of Westlaw and LexisNexis. CIS: digital serial set records – only 24% of Congressional committees have authority records. 140,000 will be machine generated; CIS used their index terms to map to subject headings – produced misleading subject headings (e.g., Tribes \$z India for Indian tribes). Alan has been talking with Polly Todd @CIS about this and other problems. ABA archive file: updates distributed with different nos. in 001 – required lots of cleanup. BNA offers records free on their website and updates are provided there also, the records are pretty good. Washburn is producing the records for the Legal classics but not World trials. Hein is negotiating with someone to do these.

It was suggested that we create a Wiki for group discussion but not everyone wants it to be public.

The Task Force has a spot on the TS-SIS website where we could post notes about each record source and our evaluation of them (e.g., problems). We also should send a message to the TS-SIS list about our final evaluation of products. It was also suggested that we post guidelines for libraries considering buying records.

It was decided during the meeting to combine the charges 1 and 2. We also need to make vendors aware that we are available to help them as they approach a MARC record project. Vendors, other than Cassidy, are often unaware of standards.

Yael is planning a program next year on how to evaluate and fix vendor records, using reports to isolate fields so that irregularities jump out. It was also suggested that we post our methodology on our site after next year's program.

Meeting adjourned.

*Submitted by
Judy Vaughan-Sterling*

MINUTES

Online Bibliographic Services Special Interest Section Annual Business Meeting

The meeting was called to order at 5:20 by Chair, Susan Goldner.

Kathy Faust gave the Treasurer's report announcing that the SIS has \$2,864.58. Her news was greeted by cheers!

Andrea Rabbia reported on the annual survey results. She had a return rate of 23% or 69 out of 303 respondents, which was the same number of responses as last year. Most people felt that we should merge the OCLC and RLIN committees, which will mean a revision of the bylaws. The full survey results may be viewed on the website.

Caitlin Robinson reported on the activities table in the exhibit area. The activities table was stocked with candy, stickers, brochures, listings of the OBS programs, a Mr. Potato Head, and the book exchange. Caitlin, after serving a full term as one of the members-at-large, stepped in to fill out Stephanie Schmidt's unexpired term when Stephanie resigned.

Corinne Jacox received applause for her efforts on creating a new brochure. She also reported that the "Alphabet Soup Reception" went well. Innovative Interfaces, Inc. donated \$6500, \$1000 more than last year. The question of whether we should continue with the reception came up. No decision was made, as most people were ambivalent.

Georgia Briscoe gave the Nominations Committee report. She thanked the rest of her committee and announced the new officers. Michael Maben is the incoming vice-chair, Susan Karpuk is the newest member-at-large and Mary Strouse is the incoming secretary/treasurer.

Andrea announced that there are nine programs under consideration for the Portland meeting. She urged anyone who had some program ideas to attend the education meeting on the 17th.

Mary Jane Kelsey reported on the Local Systems Committee. The vendor showcase this year was on federated searching. Innovative and Serials Solutions showed their federated searching products. Library Find, an open source product created by Oregon State University Libraries, was also represented. A roundtable on federated searching followed the next day. There was a good response to both the showcase and the roundtable. Susan Goldner announced that Mary Jane received the Renee D. Chapman Award from TS-SIS and had to leave the showcase early.

Pam Deemer reported on the OCLC/RLIN committee. They had two forums going this year, one for OCLC, and the other for RLIN. In addition there was an update session and a business meeting here in New Orleans. At the update session they talked about institutional records, WorldCat.org and WorldCat Local. At the business meeting they talked about institutional records, the browser vs. the client, and problems with Z39.50.

Pat Callahan reported that the Committee on Record Sharing sent out a survey to members of PLL and OBS members and to vendors. There was a consensus that the committee should move forward on creating guidelines on record sharing. A draft outline is being worked on.

Shannan Burchard reported being able to keep up with the routine of running the website, but wasn't able to do much else.

Caitlin Robinson reported that the Joint Research Grant Committee is going to send out a call for papers. The committee also talked about ways to communicate what people are working on or thinking about working on. A wiki is being considered to help this communication.

Pam Deemer reported on the Project Counter Working Group. They determined which institutions are using Counter. They sent out a survey to ALL, OBS and TS members and got 6 responses. They hope to send out vendor guidelines for compliance and hope to work on a web page.

Brian Striman reported on *Technical Services Law Librarian*. The major problem has been the delay in publication of issues. To remedy that Brian has set up a special email account for just *TSLL* business. He would like to put time sensitive issues/news in an RSS feed as well as the quarterly publication. The PDF version of the quarterly publication would continue in addition to the RSS feed. He hopes the column Techscans will be available on a blog. There are some vacant column positions. Columnists have a two-year term with automatic renewal until the columnist wants to quit. Brian thanked Julie Stauffer and Cindy May, for their work on *TSLL*. Anne Meyers thanked Brian for the excellent content of *TSLL*.

Susan Goldner mentioned that headquarters asked OBS what outside of AALL committees we would like to have representation on. She let them know that we wanted to keep a representative to MARBI and would like to add a representative to NISO. Brian Striman mentioned that the editor of *TSLL* used to know about the changes to NISO, but that hasn't been the case for a while. Susan announced that there is grant money available for programs in nontraditional formats. She also announced that the community service projects that occurred on Friday will continue in future years. She suggested that now that we have a little money in the treasury we might be able to do more programs. Finally she thanked the Education Committee and program coordinators for their hard work this year; Ellen McGrath for moderating the Joint Research Roundtable; and outgoing board members Kathy Faust, Richard Jost, and Caitlin Robinson.

Then Susan Goldner passed the OBS chair's cap to Andrea Rabbia. This year the cap is sporting the addition of a fleur-de-lis pin bought at this year's convention.

Andrea thanked Susan for her hard work and presented her with a Raku vase and a book about raku. Andrea's goals for the year include seeing the formal merger of the OCLC and RLIN committees by revising the bylaws; getting the governing and leadership documents into shape (she needs volunteers); establishing a special committee for continuing education outside of the Annual Meeting; and working on record sharing.

The meeting was adjourned.

*Respectfully submitted,
Kathy Faust*

Online Bibliographic Services Special Interest Section Special Committee on Record Sharing Meeting

*Reported by Caitlin Robinson
University of Iowa*

The OBS-SIS Special Committee on Record Sharing held a productive meeting on July 15 during the 2007 Annual Meeting. Chair, Pat Callahan, called the meeting to order and expressed her pleasure at the high turnout. By way of introduction, Pat reviewed the Committee's charge. The group then turned their attention to the survey that was distributed earlier in the year. Everyone was very pleased at the high response rate for the librarian survey (193 survey respondents). The group was particularly pleased that law firm librarians returned so many surveys. Only three responses were received from the survey that was sent to vendors, but those responses yielded some useful information.

In a wide-ranging discussion, the committee agreed that the clear message from the librarian respondents was concern with ethical issues related to the "nabbing" of whole records through Z39.50 interfaces, and the like. Most survey responses indicated that retrieving classification or even subject headings to assist with the completion of local cataloging, was considered more acceptable behavior by librarians.

OCLC was one of the vendor survey respondents. Glenn Patton indicated that Z39.50 access to WorldCat and the ethics of record sharing were frequent discussion topics within the OCLC Users Council. Patton supplied some very useful

information regarding OCLC's "Guidelines for the Use and Transfer of OCLC-Derived Records" (<http://www.oclc.org/support/documentation/worldcat/records/guidelines/default.htm>). The Guidelines clearly state that OCLC member libraries may transfer records to other libraries, but they also stress the importance that transfers take place with the agreement and knowledge of both libraries. The Committee recognized this as an important concept.

The discussion then turned to potential mechanisms for protecting against record nabbing. Some ILS systems allow the library to identify and track unauthorized Z39.50 access attempts. Other ILS systems require authentication for Z39.50 access. The Committee also discussed enforcement and whether there might be a reporting/regulatory role that OCLC regional groups could play. Finally, the Committee discussed whether there was a need for an AALL sponsored statement, similar to the OCLC guidelines that would offer guidance in relation to record sharing and/or nabbing.

The Committee agreed that it *would* be appropriate to draft a set of guidelines, to be shared with the OBS-SIS Executive Board. It was also suggested that the guidelines should be shared with the TS-SIS Executive Board—given the high level of interest on the part of law firm librarians, should also be shared with PLL-SIS. The Committee also felt it appropriate to solicit input from OCLC on the draft. Once the guidelines are refined through input from these groups, the Committee agreed that the final draft should be sent to the OBS-SIS Executive Board with the suggestion that it be shared with AALL leadership. The following Committee members agreed to develop an initial draft of guidelines for the Committee to review: Katrina Piechnik, Joni Cassidy, Caitlin Robinson, Pat Callahan. This group will send the draft guidelines, to the Committee for review and comment.

OBS-SIS & TS-SIS Joint Research Roundtable

*Reported by Susan Lupton
JD MLIS of Albuquerque NM*

Getting Published

The Research Roundtable discussion topic was "Have you ever published? Or, considered publishing?" Ellen McGrath, SUNY Buffalo, chaired the meeting, which had ten attendees, mostly university law librarians. The roundtable was created as an enabling vehicle to help law librarians get over the various points in the publishing process where they stop, saying "But I can't..." Many of the attendees came because they were interested in the topic, though not involved on a day-to-day basis with technical services.

Ellen's comment about publishing in *TSLL* or any other OBS/TS communication medium was that if the topic touches technical services or online bibliographic services in any way, then they would be interested in seeing the piece. She described how *TSLL*, which is published electronically, chooses its columnists. It's open to all OBS/TS-SIS members who are willing to make a two-year commitment. A letter of interest and a CV should be sent to editor Brian Striman at: tsll@unlnotes.unl.edu. The two-year commitment is because readers expect to find the same column in the same place, issue after issue. She emphasized that columnists need not be experts, just interested writers.

Of interest to both OBS, and TS-SIS members is the availability of up to \$1000 in research grant money. The details were still being worked out at the time of the conference. You can view them at: <http://www.aallnet.org/sis/obssis/research/index.htm>.

The Roundtable is proposing a Web 2.0 site to host discussion among members about topics that are being researched and information that people may need.

Ellen McGrath keeps an informal email list for opportunities to publish and present papers and research.

The Roundtable then opened up to more general discussion of where to publish, what to publish, how to write, and how to publish.

Where to publish issues included:

- What is considered a peer-reviewed journal in law librarianship? Most said that their institutions considered *Law Library Journal* and *Legal Reference Services Quarterly* when working with tenure requirements. Candidates for tenure should ask their tenure committees what they expect.
- Publishing in bar-related publications is valuable both to increase awareness of what law libraries have to offer, and to present substantive information on timely topics.

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- Law librarians often overlook the many general library publications.
 - AALL special interest section or chapter newsletters are a good place for the beginner to start. The theory being “practice makes perfect,” new writers should “just do it” both as a service to the organization and as a place to be heard and noticed.
 - Web-based publishing was touched on. There was discussion about the difference between e-journals and self-publishing. Self-publishing was then broken down into institutional publishing and individual publishing.

What to publish ideas were:

- Take one body of research and package and repackage it for different readers and in different formats.
- Get inspired by your personal interests. If you love the topic, it might get done.
- Take note of the questions you are being asked as part of your day-to-day job. Choose topics of current interest, small projects that could be further fleshed out, or just the odd topic about which little has been written.
- Write your way into a new area of interest. Look at a topic as a form of continuing education in order to advance your career in a different direction.
- Just because a topic has been covered once does not discount writing about it. Consider doing an update or approaching it from a new direction, or revisit old topics with new eyes.

Suggestions on “how to write” were:

- Don’t be afraid to ask your institution for professional development time.
- Joint authorship can help push a project along to completion. Distance issues can be overcome with use of email and computer software.
- Write about something that will pique your interest when you go home to it.

How to publish hints were:

- Read the publication’s editorial policy before you get very far into the process.
- Talk to the editor of the journal in question early in your thinking. Find out whether he/she is interested. Are there any special issues coming up where it might fit? Is there any particular slant that might interest the readers? And of course, is a paper on the same topic already in the editorial pipeline?
- If acceptance of a piece and the deadline for tenure are at issue, several people said *Law Library Journal* is very responsive because of its short lag time.
- Be aware of the pitfalls of “first publication” when dealing with peer-reviewed journals.
- One way to write and do research and not publish is to participate in the LexisNexis Call for Papers program. These papers are reviewed by a committee and may be considered to be peer reviewed. Many of the papers’ authors go on to solicit for publication by journals.
- Some projects require research that entails costs. People were reminded to think big and not overlook AALL, ALA, ABA, or institutional research grants.

AALL MARBI Representative Report 2006-2007

*George Prager
New York University Law Library*

Introduction

In Part I, I will highlight some of the most significant developments in the MARC formats during 2006-2007 resulting from the MARBI meetings at the American Library Association’s January and June 2007 meetings. I will follow in Part II with more detailed summaries of all the proposals and discussion papers, and any other MARC news of note. Links to full text of the proposals and discussion papers are given in the sections with detailed summaries. Unless noted otherwise, all the proposals were approved. In Part III, I will give other MARC news.

Texts of all the papers are available online via links on the MARC Development section of the MARC Web site at <http://www.loc.gov/marc/development.html>

MARBI Minutes of the Jan. 2007 ALA Midwinter Meeting are available directly at <http://www.loc.gov/marc/marbi/minutes/mw-07.html>

MARBI Minutes of the June 2007 ALA Annual Meeting are at <http://www.loc.gov/marc/marbi/minutes/an-06.html>

Part I. Highlights

1. Incorporating Invalid Former Headings in 4XX fields of the MARC 21 Authority Format (MARC Proposal No. 2007-02)

Even though former headings are sometimes invalid as cross references, it is highly desirable to have some means of identifying any invalid headings for purposes of data correction. These invalid headings will be marked by the following:

A new value ‘h’ (Do not display) has been defined for subfield \$w/1 in 4XX fields.

Subfield \$w/2 will use either of the two existing applicable values:

- ‘e’ for earlier established form of heading (national authority file), or
- ‘o’ for earlier established form of heading (other authority file).

Subfield \$i may be used to contain the date on which the heading became invalid.

2. Addition of Linking ISSNs to MARC 21 Bibliographic field 022 (MARC Proposal No. 2007-05 and MARC Discussion Paper No. 2007-DP03)

ISSNs serve as one way to differentiate serial publications, not only different serial titles, but also versions of the same serial in different medium (print, online, CD-ROM, etc.). The ISSN centers have historically assigned different ISSNs to print and online versions of a continuing resource. However, there is also a need to collocate all the medium versions of a continuing resource. The recently revised ISO ISSN standard has defined a “linking ISSN” or “ISSN-L”, which has now been defined in MARC 21 as well. MARC Proposal No. 2007-03 has added two new subfields to field 022: a new subfield \$l for the linking ISSN, and also a new subfield \$m for a cancelled and/or incorrect ISSN-L. The first ISSN assigned to the publication in any medium will function as the ISSN-L.

3. Changes for the German and Austrian Conversion to MARC 21 (MARC Proposal No. 2007-06 and DP No. 2007-DP01)

In 2004, Germany and Austria decided to move from their own bibliographic format (Maschinelles Austauschformat für Bibliotheken, MAB) to MARC 21, a more internationally used standard.

In general, Proposal No. 2007-DP01 aims to reconcile the major differences between MAB2 and MARC 21. It defines some new elements on a national basis (D-MARC), or proposes them for inclusion into MARC 21. The proposal is divided into thirteen parts. Some of the most significant changes are:

- *Addition of Subfield \$0 for the Authority Record Control number to all headings fields (MARC 21 Bibliographic, Classification, and Community Information formats). (Proposal No. 2007/06/1)*
The major use of this subfield will be to link headings on bibliographic records with the corresponding authority record/s for purposes of heading verification and correction.
- *Linking the series added entry field on an analytic record to the series record by means of subfield \$w. (Proposal No. 2007-06/2)*
- *Adding Codes for multivolume monograph record levels in the MARC21 Bibliographic format. (Proposal No. 2007-06/5)*

In the German model, it is necessary to distinguish between a set record for a multivolume monograph and a record for a single volume monograph. The set record is chiefly used for acquisition purposes, while the single volume records are needed for lending and interlibrary loan. The German model also distinguishes between single volume records with strong titles and those with weak titles.

Leader 19 in the Bibliographic format has been renamed “Multipart monograph record level”, and has new values for:

- # Not specified or not applicable
- a Set record
- b Multipart monograph record, independent title
- c Multipart monograph record, dependent title
- r Linked record requirement (Obsolete)

It is hoped that these new values will also be useful in the cataloging of cartographic and music nonserial items.

- *Establishing Codes for Offprints, Preprints, and Postprints in MARC 21 Bibliographic 008/24-27 Books. (Proposal No. 2007-06/6)*
- *Defining indicators for type for uncontrolled keywords in the MARC21 Bibliographic, Classification, and Community Information formats (Proposal No. 2007-06/8)*
MARC 21 Bibliographic field “653” (Index term – uncontrolled) did not differentiate between types of uncontrolled subject terms. Second indicator values have been approved for topical term, personal name, corporate name, meeting

name, chronological term, geographic name, and genre/form term. There is also a blank default for “No information provided.”

- *Adding field 751 for a geographic name added entry to the MARC 21 Bibliographic format (Proposal No. 2007-06/11)*
Field 751 has been added for non-hierarchical geographic names. Subfield \$4 will use three letter relator codes for the following: event place, publication place, distribution place, and university place. Additional codes may be useful.
- *Adding field 363 for normalized dates and sequential designations in the MARC 21 Bibliographic format (Proposal No. 2007-06/13)*

The German and Austrian MAB community use highly structured start and end information for serials. In the case of serial title changes, this structured data facilitates machine identification of which serial record contains an article—quite useful for interlibrary loan purposes.

Field 363 will be coordinated with the existing 863 field subfields, and repeated for starting and ending information, linked via \$8. A new subfield, \$u, first level textual designation is also proposed.

The first indicator will be for Start/End designator (No information given, Starting information, Ending information); the second indicator for State of issuance (Not specified, Closed, or Open).

I think field 363 has great benefits for automated international bibliographic record exchange. At some point, it could replace field 362.

4. Considering a new field for data elements needed to ascertain copyright facts (MARC Discussion Paper No. 2007-DP05).

Currently, the MARC 21 formats have no field which allows the recording of detailed information about the copyright status of a work. Some information of this nature may appear spread over some or all of the following MARC bibliographic fields:

260 \$c, 506, 540, and 017. While many works in archives and on the Internet contain scant copyright information, it would be beneficial for users if any copyright information available at the point of cataloging were encoded into the bibliographic record. The MARBI Committee favored a new field 543 for this information. No. 2007-DP05 will be brought back as a proposal.

5. Consideration of how to represent the Dewey Decimal Classification (DDC) System in MARC 21 Formats (Discussion Paper No. 2007-DP06)

Changes are proposed to the MARC21 formats to accommodate the conversion of DDC classification data from a proprietary system into the MARC 21 formats. This conversion will make DDC classification information available in a format using an international standard, and will also further the integration of data in OCLC’s WorldCat and in related authority files. The Dewey editorial team will be working together with the German National Library which has also made suggestions for changes in the same area, due to their ongoing conversion from MAB to MARC 21. This is a long and complex discussion paper. Several of the proposals would enhance information retrieval by allowing searching by meaningful parts of a call number or by multiple Dewey numbers in the same record.

6. Access Level Record for Serials Working Group Final Report, July 24, 2006. Appendix N, MARC 21 Recommendations

While developing the “Access level record for serials” (now called the “CONSER standard record”), the Working Group came up with recommendations for changes to the MARC21 bibliographic format. The major recommendations include:

- Increasing the number of 7xx linking field indicators to make a greater range of note displays possible.
- Adding Subfield \$i to these fields to allow for note generation from these access points.
- Adding dates to 7xx and 8xx fields of corporate bodies and series to indicate spans of time that the body or series was associated with the work.
- Assigning specific MARC tags to the “Description based on” and “Latest issue consulted” fields to allow suppression of these fields, or add display control indicators to all fields to allow their suppression.
- Regularizing and simplifying MARC 21 prescribed punctuation

7. Update #7 to the MARC Formats (October 2006)

As announced on May 14, 2007, Update #7 to all five MARC 21 formats is now available.

Part II. Summaries of all 2007 MARC Proposals with any related 2007 Discussion Papers

MARC Proposal No. 2007-01: Definition of subfields \$b and \$j in field 041 in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2007/2007-01.html>

This proposal arose out of 2006-DP06 at <http://www.loc.gov/marc/marbi/2006/2006-dp06.html>. For further information on

the background for this proposal, see the discussion in last year's AALL MARBI report at <http://www.aallnet.org/sis/tssis/representatives/2006/marbi2006.pdf>

Subfield \$b in field 041 previously included language codes for summary, abstracts or subtitles. This broad definition was problematic, particularly for moving images, as some may have different languages for subtitles or captions than they do for abstracts or summaries. Proposal 2006-DP06 narrows the scope of subfield \$b and redefines it as "Language code of summary or abstract." It also defines a new subfield \$j in field 041 as "Language code of subtitle or caption." This proposal passed at the MARBI January 2007 Meeting, with the change that "subtitle" and "caption" be presented in the plural in MARC 21 documentation.

MARC Proposal No. 2007-02: Incorporating Invalid Former Headings in 4xx fields of the MARC 21 Authority Format

<http://www.loc.gov/marc/marbi/2007/2007-02.html>

The issues in this proposal were first discussed in Discussion Paper No. 2006-DP03 (<http://www.loc.gov/marc/marbi/2006/2006-dp03.html>) and 2006-DP08 (<http://www.loc.gov/marc/marbi/2006/2006-dp08.html>). I have previously reported on these two DPs in my 2005/2006 MARBI report at <http://www.aallnet.org/sis/tssis/representatives/2006/marbi2006.pdf>

Even though former headings are sometimes invalid as cross references, it is highly desirable to have some means of identifying any invalid headings for purposes of data correction. This paper proposes that 4XX fields be used, with a new code defined in subfield \$w/2 (Control subfield/Earlier form of heading) to show that the earlier heading appearing in the field is invalid. The proposal was approved, with the following modifications agreed to at the January 2007 MARBI Meeting:

A new value 'h' (Do not display) will be defined for subfield \$w/1.

Subfield \$w/2 will use either of the two existing applicable values:

'e' for earlier established form of heading (national authority file), or
'o' for earlier established form of heading (other authority file).

Subfield \$i may be used to contain the date on which the heading became invalid.

MARC Proposal No. 2007-03: Addition of subfield \$5 (Institution to which field applies) in fields 533 (Reproduction Note) and 538 (Systems Details Note)

<http://www.loc.gov/marc/marbi/2007/2007-03.html>

The Registry of Digital Masters, a joint project of the Digital Library Foundation (DLF) and OCLC, intends to register the existence of "persistently digitally reformatted and born book and serial publications." OCLC records will indicate which institutions have locally digitized an item and have assumed responsibility for preserving the item, and where service copies are available. Bibliographic records for items which are part of the registry will have the symbol "dlr" in field 042.

Both the separate and single record approaches are allowed for cataloging locally digitized serials and monographs. (See: *Guidance for Cataloging Locally Digitized Resources*, available at <http://www2.lib.uchicago.edu/~rd13/CIC/Guidance.html>; created Nov. 13, 2006, and last revised June 8, 2007, and: *Registry of Digital Masters Record Creation Guidelines*, version 2, published May 2007: <http://www.diglib.org/collections/reg/DigRegGuide200705.htm>)

Field 583 (Action Note) already allows subfield \$5 for indicating to which institution the note applies. The addition of this subfield to fields 533 (Reproduction Note) and field 538 (System Details Note) would be useful as well, so that an institution could view information about which (if any) issues of a publication have already been digitized by another institution prior to making any such decisions itself. There might be cases of multiple 533, 538, and 583 fields representing the digitized versions of different institutions, if the different institutions have digitized different issues of a serial.

An alternative to use of subfield \$5 in the MARC bibliographic note fields would be to use the holdings format. Although holdings records could be used for copy specific information, they are frequently not indexed or available for OAI harvesting. At some future point, if these problems are overcome, then the holdings format could be used instead of the \$5 in the bibliographic note fields.

This proposal was approved as amended at the January 2007 MARBI Meeting: Subfield \$5 will also be added to the corresponding holdings fields (Fields 538 and 843). The name of the proposal is also changed to include the final addition of the words "in the MARC 21 bibliographic and holdings format."

MARC Proposal No. 2007-04: Use of field 520 for content advice statements in the MARC 21 bibliographic format
<http://www.loc.gov/marc/marbi/2007/2007-04.html>

and: MARC Discussion Paper No. 2007-DP02: Use of field 520 for content advice statements
<http://www.loc.gov/marc/marbi/2007/2007-dp02.html>

In 2003, a web-based union catalog of materials available in accessible formats was launched in the United Kingdom. This catalog is called RevealWeb at <http://www.revealweb.org.uk/>, and is primarily geared towards visually impaired users. Most of the records are for Braille, moon, audio and digital talking books, and large print books. For some materials, content advice statements would be helpful.

Discussion Paper 2006-DP02 proposed adding a coded value to field 008/32 in the bibliographic format so that this information could be used as a search filter. (See 2006 MARBI report at <http://www.aallnet.org/sis/tssis/representatives/2006/marbi2006.pdf>.) Because this would entail reusing an obsolete position in the 008, MARBI decided against this proposal. A new discussion paper (2007-DP02) was then brought forward at the January 2007 MARBI Meeting, proposing that a variable field, either 520 (Summary, etc.) or 521 (Target audience note) hold content advice statements. The Committee had a slight preference for use of the 520 field, because field 521 appears to be more of a value judgment.

The following changes for field 520 were proposed and then approved at the June 2007 MARBI Meeting:

- Define first indicator value 4 (Content advice)
- Define subfield \$c for Assigning agency
- Define subfield \$2 for Source

Example [from the proposal]:

520 4#a Contains violence \$c [Revealweb organization code]

Example/s will be added to the proposal for field 520, some with, and some without, field 521.

MARC Proposal No. 2007-05: Definition of 022 subfields for recording the linking ISSN (ISSN-L) in the MARC 21 Bibliographic, Authority, and Holdings Formats
<http://www.loc.gov/marc/marbi/2007/2007-05.html>

and: MARC Discussion Paper No. 2007-DP03: Recording the linking ISSN (ISSN-L) in the MARC 21 Bibliographic, Authority, and Holdings Formats
<http://www.loc.gov/marc/marbi/2007/2007-dp03.html>

The ISO ISSN standard (ISO 3297) has recently been revised, and is expected to be published in a new edition by the end of summer 2007. This revised standard defines a “linking ISSN”, or “ISSN-L”, which serves to collocate all the medium versions of a continuing resource. Separate ISSNs will continue to be assigned to print and online versions of a resource; the first ISSN assigned will be designated by default to also function as the ISSN-L. This linking ISSN should be implemented in June 2008. As announced by Regina Reynolds at the June 2007 MARBI Meetings, the ISSN Center will make tables freely available matching up pre-existing ISSNs with their corresponding ISSN-Ls.

Discussion Paper No. 2007-DP03 presented various options for how to incorporate the new ISSN-Ls into the MARC 21 formats. One proposal was to repeat field 022 and to add an indicator to make clear whether the field had an ISSN or ISSN-L. At the January 2007 MARBI Meetings where this DP was discussed, it was decided to define new subfields in field 022 for the ISSN-L and for the cancelled and/or incorrect ISSN-L.

The subsequent proposal, MARC Proposal No. 2007-03, defines subfield \$l for the ISSN-L, and also subfield \$m for the cancelled ISSN-L. Each cancelled ISSN-L (if more than 1), are contained in a separate subfield \$m. Catalogers will not need to record any cancelled ISSN-L; rather it will be the responsibility of ISSN centers.

MARC Proposal No. 2007-06: Changes for the German and Austrian conversion to MARC 21

Date: May 25, 2007: made available to the MARC community for discussion, <http://www.loc.gov/marc/marbi/2007/2007-06.html>

MARC Discussion Paper No. 2007-DP01: Changes for the German and Austrian conversion to MARC 21
<http://www.loc.gov/marc/marbi/2007/2007-dp01.html>

Background:

Germany and Austria have exchanged bibliographic and authority data by means of their own machine readable format (Maschinelles Austauschformat für Bibliotheken, MAB), which was developed in 1973. The latest version is called MAB2.

In December 2004, the Committee for Library Standards (Standardisierungsausschuss) decided to move from MAB2 to the more internationally used standard, MARC21.

In 2005, the Data Format Expert Group (Expertengruppe Datenformate) undertook a complete mapping from MAB2 to MARC21, which was finished in 2006. Three major differences were identified by the Expert Group:

1. The connection between headings and appropriate authority files.

The DNB maintains 3 German language authority files: PND (Personal names), GKD (Corporate bodies), and SWD (Subject headings). It provides a weekly update service for the national authority files which subscribers import as routine updates. The updates rely on authority record control numbers for every established heading which appears in an authority and bibliographic record. The authority record control numbers need to be put in a special subfield. (This will be further discussed under Proposal No. 2007/06/1).

2. The mapping of hierarchical structures in the context of multivolume works (multipart monographs, series

The MAB format creates a record for every volume of a multivolume work, and a collected set record as well. No authority records are created for multivolume monographs or for monograph series. The Germans distinguish between a “Stucktitel” (a single volume with a strong title) and “Bandaufführung” (a single volume without a dependent title; also called a “weak title”). A “weak title” is similar to the AACR2 concept of a part with no title of its own (AACR2 & LCRI 25.6A), such as “Teil” (General part).

Strong title:

245: Volume title

490 1: Series title

830: Series title

Field 440 is not used.

Weak title or no title:

245: \$a \$n \$p

773: Connection to record for the multivolume set, with \$w for record control no. of set

Volume bibliographic records sometimes give bibliographic control numbers referring back to the record number of the collected set record.

3. Sorting of volume numbers and dates. (Discussed under Proposal No. 2007/06/4).

Proposal No. 2007/06/1: Authority record control number subfield in the MARC 21 Bibliographic, Classification, and Community Information formats

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p1>

\$0 – Authority record control number (Repeatable)

In headings fields, the MARC organization code (in parenthesis) will be followed immediately by the authority record control number. Subfield “0” will be repeatable, as there may be more than 1 authority record associated with a text string.

This proposal was approved, with the stipulation that several new fields will be added to the list of fields for which \$0 is valid: 4xx and 8xx series fields, and field 880 for nonroman data.

Proposal No. 2007-06/2: Bibliographic record control number subfield in series added entry fields in the MARC 21 Bibliographic format.

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p2>

Subfield \$w is proposed, to be consistent with its use to link to bibliographic records in the 7xx linking entry fields in the bibliographic format.

In MAB, each volume/item bibliographic record carries the record control number for the bibliographic set record, along with an added entry field for the set. The control number assists in the linking of the added entry with the corresponding set records, as no authority records are created for multivolume monographs or monographic series.

Proposal No. 2007-06/3: Authority record control number in the 260 field of the MARC 21 Authority format.

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p3>

“This proposal adds a subfield to authority field 260 (Complex See Reference – Subject) for the authority record control

number of any established heading that appears in the field.”

In MARC 21, established heading fields except the 1XX in the authority format will also need a subfield for established record control number. Subfield \$0 is already authorized for use with 5XX and 7XX fields, to reference the control number of the established heading in the field. But field 260 does not yet allow a record control number.

The proposal gives an example of a compound German word, an unauthorized heading, which is represented by 2 authorized single terms (a German subject heading preference).

Proposal No. 2007/06/4: Normalization of numbers and names in the MARC 21 Bibliographic format

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p4>

This proposal is for additional subfields in several bibliographic fields to carry normalized forms of part names and numbers, series numbers, and edition numbers.

MAB community would like a subfield defined for sorting forms of numeric (primarily) data and some name data, for fields where number information is recorded traditionally in transcribed form and normalization is needed to sort them properly in ILS/OPAC displays for end users. The areas where the subfield is especially needed:

1. Numbers and names of part/section in field 245 \$n and \$p
2. Volume designations in 8XX series entry fields, subfield \$v
3. Edition designation in 250 \$a

Proposed changes: In the Bibliographic format, for the following fields define a new subfield \$y for the normalized data:

Field 245 \$y

Fields 800-830 \$y

Field 250 \$y

While the normalization algorithms aren't officially standardized in Germany, the German National Library's rules function as a de facto standard. At the ALA Annual Meeting, this proposal didn't pass. The consensus was that it would be difficult to make this kind of information generally useful, and it would be better treated at the local level. I found the examples in the Proposal difficult to understand.

Proposal No. 2007-06/5: Codes for multivolume monograph record levels in the MARC21 Bibliographic format

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p5>

“This proposal establishes codes to enable indication of the level of a multilevel record within its bibliographic hierarchy.”

In the German model, it is necessary to distinguish between a set record for a multivolume monograph, and a single volume monographic record. The set record is chiefly used for acquisition purposes, while the single volume records are needed for lending and interlibrary loan. It also needs to distinguish between single volume records with strong titles, and those with weak titles.

A coded position needs to be defined where the following values can be indicated:

1. Set record (for multivolume monograph)
2. Volume level record (of multivolume monograph), independent title
3. Volume level record (of multivolume monograph), dependent title

Discussions in January 2007, to use Leader/19 (Linked record requirement) which currently has values # (related record not required) and “r” (related record required). “r” hasn't been used at all in OCLC since its implementation, so the proposal is as follows:

Proposed Change: Redefine the Leader/19 in the Bibliographic format as follows:

Position 19 Multivolume monograph record level

Not specified or not applicable

a Set record

b Volume record, independent title

c Volume record, dependent title

r Linked record requirement (Obsolete)

This proposal passed, with changes. At the Annual Meeting, it was decided to change the phrase “Volume record” with “Multipart monograph record”, so that the proposal would be more broadly applicable for cartographic and music nonserial items (among others).

Proposal No. 2007-06/6: Nature of Contents for offprint in the MARC 21 Bibliographic format

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p6>

This proposal was to establish a code for offprints in MARC Books Format 008/24-27, Nature of Contents.

Some Committee members preferred use of 655 “Offprints” or its German equivalent, field 787 with link to original publication. Eventually, it was agreed that 008/24-27 in the Books 008 was the best place for this type of information.

This proposal was approved, and codes will also be added for preprints and postprints as well.

Proposal No. 2007 06/7: Subfield for Cancelled National Bibliography Numbers in the MARC 21 Bibliographic format

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p7>

Subfield “\$z” is defined in field 015 for cancelled or invalid national bibliography numbers.

This proposal was approved, as amended. In order not to limit the structure of the number in this field, the last sentence of the proposal before the examples was deleted: “The number content would have the same structure as in field 015 \$a.”

Proposal No. 2007-06/8: Define indicator for type for uncontrolled keywords in the MARC21 Bibliographic, Classification, and Community Information formats

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p8>

MARC 21 Bibliographic field “653” (Index term – uncontrolled) has not been differentiating between types of uncontrolled subject terms. Because these distinctions are important to the MAB community, Second indicator values are proposed for field 653. The following values were approved:

Second - <Type of term or name>

<No information provided>

<0 – Topical term>

<1 – Personal name>

<2 – Corporate name>

<3 – Meeting name>

<4 - Chronological term>

<5 – Geographic name>

<6 – Genre/form term>

Examples will be added to the Proposal, with 2nd indicator “#”, and with multiple subfield \$a.

Proposal No. 2007-06/9: Field for replacement record information in the MARC 21 Bibliographic format

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p9>

This proposal defines a new field “882” for use on a bibliographic record which is to be deleted. The field carries information about a record which is replacing the deleted record. OCLC uses field 019 on the record to be retained to record information about a deleted record, but there’s really no field currently defined for use on the bibliographic record to be deleted (CONSER participants use field 936 to record this sort of information for serials, but this field has other uses as well, and (more importantly), is defined for local use. Field “882” would be the bibliographic counterpart of field “682” in the authority file.

This field would have the following subfield codes:

\$a Replacement title

\$i Explanatory text

\$w – Replacement bibliographic record control number

\$6 – Linkage

\$8 – Field link and sequence number

Proposal No. 2007-06/10: Define a replacement record control number subfield in MARC 21 Authority format

<http://www.loc.gov/marc/marbi/2007/2007-06.html#p10>

When an authority record is to be deleted, Field 682 is used to redirect any bibliographic records associated with the old authority heading. (This field appears currently only on LC's subject heading weekly lists).

Information on the replacement heading is already given in field 682 subfield "a". This proposal defines a new "Subfield \$0" to give the replacement authority record control no.

Authority Record to be deleted:

100 1 \$a Heading to be deleted

682 \$a Valid replacement heading \$0 (MARC Organization Code) control number

An example will be added from LCSH, which puts the control number along with informative text in subfield \$i.

Proposal No. 2007-06/11: Add a field for a geographic name added entry to the MARC 21 Bibliographic format
<http://www.loc.gov/marc/marbi/2007/2007-06.html#p11>

MAB users create non-subject added entries for various types of place names: place of publication, distribution, part of the university to which dissertations are submitted, place of events such as conferences. Field 751 was proposed for the authorized form of non-hierarchical geographic name. At first field 752 had been considered, but this field is used for hierarchical place names, and the German authority file uses only one level for place names. Relator terms may be used in subfield \$e, or relator codes can be used in a subfield \$4 for indicating the type of role. The following relator codes were proposed:

Evp – event place

Pup – publication place

Dbp – distribution place

Uvp – university place

At the June 2007 ALA Annual Meeting, this proposal passed. Additional codes were also suggested by the Committee for building place, and for place of production (generally for rare books).

Proposal No. 2007-06/12: Subfield for former call numbers in the MARC 21 Bibliographic and Holdings formats
<http://www.loc.gov/marc/marbi/2007/2007-06.html#p12>

A new subfield is proposed in field 852 of the Bibliographic and Holdings formats to provide information about former call numbers or shelf locations. This proposal is primarily intended for manuscripts and other archival materials. A researcher may sometimes know the former shelf location, but not the current one.

"Subfield \$d - Former shelving location" was added to the format. "Former call numbers" is to be changed to "former shelf numbers."

Proposal No. 2007-06/13: Field for normalized dates and sequential designations in the MARC 21 Bibliographic format
<http://www.loc.gov/marc/marbi/2007/2007-06.html#p13>

The German and Austrian MAB communities use highly structured start and end information for serials. In the case of serial title changes, this structured data facilitates machine identification of which serial record contains an article—quite useful for interlibrary loan purposes.

During the ALA Midwinter MARBI meeting in January 2007, three options were discussed:

1. Field 362 with additional subfields
2. A new field 363
3. Field 863

The 362 option was eliminated during the midwinter meeting. Field 863 has been used to indicate a specific institution's holdings rather than universal holdings, and would need various adaptations. Therefore, the proposal chiefly discusses the creation of a new bibliographic field "363" (Option "1"), which is coordinated with the existing 863 field subfields, and repeated for starting and ending information, linked via \$8. A new subfield, \$u, first level textual designation is proposed.

363 Normalized Date and Sequential Designation

Indicator 1 – Start/End designator

This indicates whether the information given is for the starting information in a sequence, or the ending information

- No information given

0 – Starting information

1 – Ending information

Indicator 2 – State of issuance

“Indicates whether the data in this field is for a single issue not issued sequentially or for a sequence that has terminated (value 0) or a sequence of issues that have not terminated (value 1).”

- Not specified

0 – Closed

1 – Open

Subfields: similar to Holdings field 863, with addition of subfield \$u for first level textual designation.

No provision is given for unsure dates or enumeration. One of the German representatives stated that the Germans wouldn't give this field if there were uncertain beginning or ending dates (which is a relatively common occurrence).

Here's a straightforward made up example:

245 00 Journal of 21st century law cataloging.

3620 Vol. 1 (2001)-v. 7 (2007).

36300 \$a 1 \$i 2001 \$8 1

36310 \$a 7 \$i 2007 \$8 1

Option “1” was approved at the ALA June 2007 Annual Meeting. Examples with multiple start and stop dates will be added to the proposal as well.

I think field 363 has great benefits for automated international bibliographic record exchange. At some point, it could replace field 362, which has many problematic aspects, especially now that the CONSER standard record has come out in favor of unformatted 362 notes.

MARC Discussion Paper No. 2007-DP04: Definition of Field 004 (Control Number for Related Bibliographic Record) in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2007/2007-dp04.html>

OCLC has suggested this field, to provide a link between separate institutional records and the OCLC master record. The same field exists in the holdings format which links a holdings record to a bibliographic record. Currently, there is no field which links to another bibliographic record in the same system.

At the January 2007 MARBI Meeting, the Committee thought that a broader solution suitable for the entire MARC community would be better. For now, OCLC should use a local solution for the present, and then if the group decides on a broader solution, OCLC can implement it retroactively. A new discussion paper with a broader range of examples will be issued.

MARC Discussion Paper No. 2007-DP05: Data elements needed to ascertain copyright facts:

<http://www.loc.gov/marc/marbi/2007/2007-dp05.html>

The issues involved were first presented in MARC Discussion Paper No. 2006-DP04, which was discussed at the June 2006 MARBI Meeting (Text of the DP: <http://www.loc.gov/marc/marbi/2006/2006-dp04.html>)

For a brief description of this DP, see my AALL MARBI 2005/2006 report: <http://www.aallnet.org/sis/tssis/representatives/2006/marbi2006.htm>

Currently, the MARC 21 formats have no field which allows the recording of detailed information about the copyright status of a work. Some information of this nature may appear spread over some or all of the following MARC bibliographic fields: Field 260 subfield \$c: Date of publication, distribution, etc., which may give a copyright date in the absence of a readily available publication date; field 506: Restrictions on Access Note; field 540: Terms Covering Use and Reproduction; and field 017: Copyright or Legal Deposit Number.

While many works in archives and on the Internet contain scant copyright information, it would be beneficial for users if any copyright information available at the point of cataloging were encoded into the bibliographic record.

2007-DP05 provides a broader range of examples and complex situations. It presents the following options for recording copyright information:

1. Option 1: Modify Field 540 – Terms Governing Use and Reproduction Note:

Many new subfields codes are proposed

2. Option 2: Define a new field “543” for all copyright information.

Most of the same data elements which would be added to Field 540 would be added for this field.

Since Field 540 also covers other general use restrictions, there might be advantages to having a completely new field dedicated to copyright information.

3. Option 3: Use Authority Record

While copyright is often at the expression level, authority records may be at the work or manifestation level.

4. Option 4: Use Holdings Record:

The largest current disadvantage to using this approach is that holdings records are not usually exchanged between institutions.

There are still many questions to be answered (See the list at the end of the DP). Whenever some or all of the pertinent copyright information is unknown, it is still useful to put that information in the record, so the potential user can try contacting the producer of the information rather than the institution itself.

At the June 2007 MARBI Meetings, most of the group were in favor of using a new bibliographic field.

This DP will be brought back as a proposal.

MARC Discussion Paper No. 2007-DP06: Representation of the Dewey Decimal Classification (DDC) System in MARC 21 Formats

<http://www.loc.gov/marc/marbi/2007/2007-dp06.html>

Changes are proposed to the MARC21 formats to accommodate the conversion of DDC classification data from a proprietary system into the MARC 21 formats. This conversion will make DDC classification information available in a format using an international standard, and will also further the integration of data in OCLC's WorldCat and in related authority files. The Dewey editorial team will be working together with the German National Library which has also made suggestions for changes in the same area, due to their ongoing conversion from MAB to MARC 21.

Changes are suggested in the following areas:

1. Identification of external table numbers in the bibliographic format

Adding the Classification Format representation of external table notation to the Bibliographic Format through a new subfield \$z – Table identification.

2. Identification of internal add table numbers

Adding subfield \$y- Internal add table identification, to the Classification format.

3. Inclusion of component parts of numbers in bibliographic records

Dewey editorial team suggests defining a new field "085" in the Bibliographic Format containing the same subfields as the "765" field in the Classification Format. (Field "765" shows how a number is built, shows the meaning of the individual parts, and enables searching of a particular component parts in classification number records. This type of searching could be quite powerful when combined with a subject heading search.

Use of subfield \$8 is recommended to link the 082 field with the corresponding 085 field(s) and to provide information on the sequence of steps involved.

Addition of this field to the Bibliographic Format would enhance information retrieval by allowing searching by meaningful parts of a call number.

4. Classification number edition and source information in the bibliographic format.

The Dewey team "proposes to develop and maintain a registry of edition identifiers in which every edition would have a standard representation in subfield \$2." In cases where LC is not the agency assigning the call number, Subfield \$5 would give the assigning agency of a Dewey number subfield.

5. Designation for optional numbers in the Bibliographic Format

While there are many optional numbers in WorldCat bibliographic records (such as in class 340 Law), there is no special designation to label a number as optional. Because of the large number of optional numbers already coded in subfield \$a in legacy data, putting these numbers in a separate subfield is not deemed desirable.

6. Multiple numbers in the Bibliographic Format

Example: 082 10 \$a 780.92 \$a B \$2 22

German libraries are interested in assigning partial numbers. There is also general interest in offering multiple numbers for works with aspects in several Dewey categories.

The Dewey editorial team proposes using successive 082 fields for each number, rather than the current practice of repeated \$a subfields in the same 082 fields. Also, coding should be introduced to represent numbers provided for access, and to distinguish between the primary number and additional numbers provided for access, and between standard and optional numbers. The following new optional subfields are proposed for field 082:

\$m Standard or optional designation

a – standard

b – optional [suggestion to use “alternative” instead of optional]

\$o Primary or access designation

a – primary

b – access

An alternative to this proposal would limit the use of the 082 field to full Dewey numbers, and give this information in new field 085 (Number components). This would add complexity to the 085 field, but avoid it in the more widely used 082 field.

7. Segmentation information in the Classification Format

Proposal to add new fields 653 and 654 to the Classification Format

653 – Segmented Classification Number (when a single Dewey number or number span is involved)

654 – Segmentation Instruction (for Dewey record numbers that contain number-building instructions to give segmentation information that can't be expressed using a single number or number span).

8. Encoding topic information in some Classification format fields

Subfield \$t – Topic information, is proposed for topics named in other classification fields. This field should assist in automated identification of the meaning of DDC numbers in examples.

9. Number hierarchy

This proposal is to add subfield \$e – Classification number hierarchy – single number or beginning number of span in Classification Format, field 153 – Classification Number. At present, only the upward caption associated with these captions in subfields \$h and \$k is given.

Part III. Other MARC News

1. RDA/MARC Report

<http://www.loc.gov/marc/marbi/2007/5chair12.pdf>

On November 17, 2006, the Joint Steering Committee for Revision of AACR (JSC) issued a report on “areas that the JSC considers would benefit from discussions with the MARC community.” While not a final report, it includes a mapping from MARC 21 to RDA. At the January 2007 MARBI Meeting, this report was introduced by Mary Stewart of Library and Archives Canada. There was some criticism that the report does not address weaknesses of MARC, but Ms. Stewart replied that this was not the intent of the report.

2. Access Level Record for Serials Working Group Final Report, July 24, 2006. Appendix N, MARC 21 Recommendations

<http://www.loc.gov/acq/conser/pdf/alr/MARC21Proposals.pdf>

While developing the “Access level record for serials” (now called the “CONSER standard record”), the Working Group came up with recommendations for changes to the MARC21 bibliographic format. These recommendations have been made available to the PCC Standing Committee on Standards and LC’s Network Development and MARC Standards Office for consideration; some or all of them may be developed into MARBI proposals. There are six proposals. I will mention four of them:

Recommendation #1: “Increase the number of 7XX linking field indicators to make a greater range of note displays possible and avoid the need for catalogers to spend time writing notes for field 580 (complex relationship notes.” Fields 780/785 indicators could more accurately describe relationships involved in mergers and splits.

Recommendation #2: “Add dates to 7XX and 8XX fields of corporate bodies and series to indicate spans of time that the body or series was associated with the work.” Subfield \$i should also be added to these fields to allow for note generation from these access points.

Recommendation #5: Specific MARC tags should be assigned to the notes: “Description based on:” and “Latest issue consulted:”, so that systems can suppress these notes from public view. (These 2 fields are required for CONSER standard records, even when the cataloging is based on the first issue). Alternately, all note fields should have display control indicators so libraries can more easily suppress and display whatever notes they wish. In my opinion, I’d like to see every MARC 21 variable field have such display control indicators.

Recommendation #6: “Examine the uses (and users) of MARC 21 prescribed punctuation with the goal of regularizing and simplifying it, especially punctuation at the end of fields.”

3. Update #7 to the MARC Formats issued

As announced on May 14, 2007, Update #7 (October 2006) to all five MARC formats is now available. The updates include changes made to the formats resulting from proposals considered by MARBI, the Canadian Committee on MARC (CCM), and by the BIC Bibliographic Standards Group (BIC/BSG) at its 2006 Meetings.

Most notable among the additions:

Bibliographic Format:

Addition of subfield \$j (Relator term) in fields 111, 611, 711, and 811

Addition of subfield \$u (Uniform Resource Identifier) in field 852

Authority Format:

Addition of field 034 (Coded cartographic mathematical data)

Addition of subfield j (Relator term) in fields 111, 411, 511 and 711

Holdings Format:

Addition of field 506 (Restrictions on access note)

Updated examples

Classification Data:

Addition of subfield \$j (Relator term) in field 711

Community Information:

Addition of subfield \$j (Relator term) in fields 111, 611 and 711

Full text of the announcements is available from links on the MARC standards: General information: News and announcements page at <http://www.loc.gov/marc/marcginf.html#naa>.

My First AALL Experience

*Sarah Rhodes
Georgetown University Law Center
Edward Bennett Williams Law Library*

As my plane from Washington, D.C., descended into New Orleans on Friday afternoon, I packed away my laptop and looked out the window in anticipation of attending my first AALL Annual Meeting. A residential neighborhood was below. From the air, I could discern the unmistakable shape of FEMA trailers, white boxes dotting the familiar aerial pattern of rooftops, green yards, and suburban streets. The sight gave me some perspective.

A hope and desire for New Orleans’ recovery was a constant presence among every one in attendance at the AALL Annual Meeting. Sandwiched between the Mississippi River and the Warehouse District, the Convention Center hosting this year’s Annual Meeting was only blocks from the French Quarter, a historic and picturesque section of New Orleans where the city’s efforts to recover and rebuild are evident and inspiring.

As a newcomer to the profession, the AALL Annual Meeting began for me on Saturday morning with the Conference of Newer Law Librarians (CONELL). CONELL kicked off with a hearty breakfast and a string of entertaining speakers that seemed to have everyone in attendance perked up and energized by the time the breakout sessions began. I found CONELL to be excellently planned and facilitated. Within a single morning, I learned a good deal about my new profession, the ins-and-outs of my new professional organization, as well as about opportunities for publishing and becoming a more active member of AALL. Moreover, the networking sessions put me in touch with a unique and interesting array of new librarians with whom I had the opportunity to build stronger relationships as the Annual Meeting progressed.

On Sunday, I was scheduled to present a brief, 15-minute Committee report introduction on behalf of my library to a small audience of AALL members concerned about the preservation of legal materials in digital formats. Although I was excited and deeply honored to have the opportunity to speak during my first Annual Meeting, especially about a topic for which I have great interest and passion, I must admit that I was also slightly nervous. After all, fear of public speaking is said to be among the most common of all phobias; no one wants to make a mistake in front of an audience.

Following CONELL, I returned to my hotel to find that the handouts express-mailed the previous week to accompany my presentation had never arrived. So, I rushed to the nearest Kinko's, getting there just 15 minutes before closing time. My printing was completed with seconds to spare, and I even managed to get back to the Convention Center in time for the New Cataloger's Roundtable on Saturday evening. A close call, indeed, but I learned a good lesson during my first AALL: always have a contingency plan.

Over the next few days, I was pleased to find that some of my greatest concerns relating to digital preservation were addressed within many of the Annual Meeting's educational programs and workshops, which focused on topics ranging from the authentication of electronic resources, to copyright in the digital age, and from trends in electronic publishing, to the challenges of capturing and prioritizing Web resources.

As a new librarian, I also signed up for AALL's mentor program and found myself paired with a remarkable librarian who provided me with helpful advice, materials, and policy information from her own library. In fact, I lost track of the time during our conversation at the Mentor Reception on Monday evening, and I had to pull myself away upon realizing that I had kept her 15 minutes past the reception's scheduled end.

Without question, the AALL Annual Meeting is a tremendous professional resource. Not only did I experience lively sessions on topics and trends relating directly to the work I do every day, but I also met a fascinating group of new law librarians as well as handful of experienced mentors who graciously offered their support and advice — and who have kept in touch with me even after the Annual Meeting ended. I am fortunate to have a position within an institution like the Georgetown Law Library, which provides tremendous support to its librarians for professional development. Georgetown not only encouraged my participation in AALL, but also funded my attendance at the Annual Meeting.

During my time at the Annual Meeting, I found the unique culture and spirit of New Orleans — the Creole cuisine, the vivacity of Bourbon Street, the shaded courtyards, and the hopeful determination of the city itself — to be nothing short of inspiring. And I was truly enriched by the librarians I met and the knowledge I gained during the AALL programs and sessions. Upon my return to Washington, D.C., I brought that inspiration and enrichment with me. I am privileged to have found a rewarding profession, and I look forward to many years of growing and evolving as a law librarian through my participation in AALL.

The CONELL Experience

*Jennifer Creevy
Law Library of Louisiana
Supreme Court of Louisiana*

I was one of the ninety-six people registered for CONELL, the Conference of Newer Law Librarians, on Saturday, July 14, 2007. I am a librarian new to law libraries, so I was greatly anticipating this workshop. The director of my library, Carol Billings, encouraged me to attend, as did colleagues who had previously been attendees. I found CONELL to be both personally and professionally informative. Years from now, I will be able to tell people what a positive experience CONELL was for me at my first AALL conference.

We walked into the Belle Chasse conference room at the Hilton and had our choice of pastries, coffee, and juices. At 8:30, Gregory Ivy, Mentoring Committee Chair, took to the podium and introduced himself and the CONELL Committee. He thanked CONELL's financial supporter, Thomson/West. He began the program by introducing the AALL President, Sally Holterhoff. She explained how appropriate she believed the theme of the conference, "Rise to the Challenge," was to both AALL and New Orleans. She then introduced the AALL Executive Board and new incoming board members.

Next, Diane Jaque, the Annual Meeting Program Committee Chair, discussed how AALL members could suggest a program. She explained that the Program Committee was hoping to have more interactive programs. We were then introduced to Mark Estes, editor of the *AALL Spectrum* and Janet Sinder, incoming editor of the *Law Library Journal*. Both speakers

encouraged new librarians to write for Association publications, stressing that writing for publications was something everyone could do.

The next item on the agenda was a breakout session for the attendees to get to know each other. We were split into groups based on colored slips of paper we were given randomly. Each group of 8-10 people had a leader; my group's leader was Darcy Kirk, AALL Executive Board Secretary. We introduced ourselves and discussed various questions from our CONELL handout, such as: did we have JD's? — What were our career goals and expectations? —and, How AALL can help us grow professionally?

After the breakout session, we re-gathered as one group. We were introduced to Jennifer Murray, Assistant Director of the Maricopa County Law Library, who discussed volunteer opportunities for law librarians. Using a slide show presentation, she explained the AALL website and demonstrated how to access the various committee websites. She encouraged us to volunteer for our local and regional law library chapters. She discussed Special Interest Section volunteering and gave us some tips on volunteering, such as: don't spread yourself too thin; volunteer with likes and dislikes in mind; don't be afraid to say no, but also don't be afraid to say yes; know what commitments your employer will support; and, as a volunteer, give your volunteering commitment the same effort as you would your job.

Cornell Winston was the next speaker. He quickly and humorously explained his five tips on "how to conference." His first tip was to meet five new people every day. Second, attend one session outside your specialty. Third, get a lot of "stuff" from the exhibit hall. Fourth, do something outside the convention in the host town. His final tip was to get as many ribbons as possible; the more ribbons, the more fun, he claimed.

After a ten-minute break, we had two concurrent sessions. My first session was in the "Marketplace." Various SIS's had set up information tables explaining how you could get involved. Being a technical services librarian and a court librarian, I was particularly interested in the Online Bibliographic Services SIS, and the State Court and County Law Librarian SIS. The second session was a "Speed Networking" exercise where you were seated in two lines facing each other, with one line stationary and the other line moving. We had three minutes to introduce ourselves and say a few words.

I met people from around the country working in varying types of law libraries. After the concurrent sessions, Gregory Ivy thanked us for coming and wished us a good conference. Then—lunch!

After lunch there was a bus tour of New Orleans. As a local, I'll admit to some bias, but I thought the tour showed all the different landscapes of post-Katrina New Orleans. We toured neighborhoods devastated by the storm, but we also visited beautiful areas of the city that Katrina spared.

CONELL was a great way to begin my first AALL conference. Being able to meet my new colleagues before the conference officially started gave me more confidence in introducing myself throughout the weekend. I was able to walk into most programs knowing that there would probably be at least one familiar face. My only regret is, now that I'm not a "new" librarian anymore, this will be my only CONELL experience!

Program Report

Collection Analysis Made Easy: OCLC's WorldCat Collection Analysis Service

*Reported by
Karen A. Nuckolls
University of Kentucky*

This program consisted of presentations about how several libraries have utilized the WorldCat analysis tool for their collections.

Glenda Lammers, OCLC Global Product Manager, opened the program with a general presentation on OCLC's product. WorldCat Collection Analysis (WCA) is an automated collection management decision support tool, a tool to perform ongoing analysis of your library's collection, and an online service, integrated with OCLC's WorldCat. You can view your collection by subject, pub date, language, format, and audience level. You can compare your collection with your peer institutions as well as with all of WorldCat, and you can also produce detailed reports and graphs of your collection. It is based on your holdings in WorldCat, and supports LC, Dewey and NLM classification schemes. Among other things, WorldCat Collection Analysis can help substantiate how your library needs additional funding for materials. ILL analysis enhancement was added in Nov. 2006, and in August 2007 aspects of FRBR will be applied. Circulation data will also be inputted so that a library can track the circulation of a title.

Georgia Briscoe, Association Director and Head of Technical Services at University of Colorado Law Library, discussed how their library was able to use WCA as they were preparing to move into a new building. When the Desert States Law Library Consortium (of which they are a member), purchased WCA, suddenly it was an affordable tool to use to analyze their 680,000 volumes before the move. Director Barbara Bintliff agreed. It was used to find “holes” in the library’s collection, and to compare with similar schools having more dollar resources. The library created a simple procedure, and staff shared the workload. A subject approach was used, with each librarian being responsible for a subject. As a result, collection strengths and weaknesses were confirmed; the international law area was filled in; and the library now knows of other subject areas where an increase of titles is needed. Breakdowns by legal subject headings are a challenge, as the law category is too broad. Other areas, such as human rights, can be buried in other subject headings. Improved subject refinement is needed before it really becomes a useful tool for law libraries. However, Georgia concluded that WCA is a great product with plenty of value and potential.

Billie Jo Kaufman, Director of American University Law Library, spoke about WCA from an administrative viewpoint: “The product is what the product is.” American was one of the first to acquire WCA. Further training was added. Gaps existed in their collection due to new programs, faculty, etc. They chose schools in a “comparison mode.” The charts and graphs are good for donors to see. Technical Services caught on to the product quicker than Public Services, and were a big help in training others. One definitely needs time to play and test it first. Now there are good online discussion lists and tutorials as well as users to help. She admits that they haven’t used it as well as they should—you need to create a project. American will use WCA continually, as programs and situations change. It holds great promise.

Teresa C. Stanton, Reference Librarian for Foreign and Comparative Law at UC-Berkeley School of Law, spoke of her experiences with WorldCat while at the Triangle Research Libraries Network in North Carolina (TRLN). In October of 2005, TRLN joined with the Association of Southeastern Research Libraries and the Florida Center for Library Automation to purchase a one-year WorldCat license from OCLC. The task group first replicated the 1992 study of the TRLN collections as a whole. The results showed that more than 71 percent of the aggregate TRLN collection was unique to a single institution and only 2 percent of the OCLC records analyzed overlapped at all four institutions. When North Carolina Central University records were removed from the 2006 study, the results indicated that 8 percent of the records overlapped at the other three universities, while unique holdings accounted for 70 percent of the records—almost the same proportion as the 1992 study. The 2006 OCLC-WCA project documented the consortium’s continuing effectiveness in building and providing access to some of the richest and most comprehensive library collections in the United States. While WCA is ideal for general comparisons between libraries or groups of libraries, differences in cataloging practices over the years mean multiple OCLC records for identical items. Therefore, the analysis tends to over report uniqueness and under report overlap. Subject categories are too broad, and the service relies on extracts taken from WorldCat once per quarter, so analysis results are rarely up-to-date.

Program Report

Bringing the Library to the User: The Practice Using Endeca for a Library Catalog

*Reported by
Sue Burkhart
U.S. Court of Appeals-11th Circuit*

This session was presented by Emily Lynema, from the library at North Carolina State University. She was very enthusiastic and let us all know that exciting things are happening in libraries today. Libraries should not wait around for vendors to be doing the things that librarians want or need them to do for us. We should forge ahead with our ideas and make them happen. Librarians should give their patrons today searching strategies in a single interface that the users know how to use. The results should include narrow results and relevance ranking. To improve the quality of the catalog experience it should go out and work with other tools.

They are using software called ENDECA from a commercial vendor. ENDECA is working with their online catalog from SirsiDynix Unicorn. They export records nightly from Unicorn into Endeca and index them. The patron then searches the online catalog and the searches done here are true browse searches. When the results come back then the patron can limit it further by parameters. The relevance ranking comes from where in the bibliographic record the search terms are. For example: if the search words are in the title, the relevance ranking is higher. This software is using the MARC records in new ways using enhanced meta search standards. This is very exciting stuff, realizing that librarians are indeed dismantling the old way of doing things, rearranging data, and rebuilding it into something new, different, and very usable.

Program Report

Training: Are We Missing the Obvious?

*Reported by
Meg Martin
Wyoming State Law Library*

Mary Ames, Coordinator and Moderator; Donna Ives, Bureau of National Affairs/Plus (BNA); Karen Kirk, CCH; and Robert Peters, Global Securities Information (GSI).

The program's presenters were representatives from BNA, CCH, and GSI. All three were articulate, knowledgeable, and service-oriented professionals. They began the presentation by sharing what their help desk training includes and what users can expect from the help desk. After that, the floor was opened for questions.

Each of the three trainers spoke about their training programs giving insight into the level of expertise callers can expect from the help desk operators. Operators have deep and extensive knowledge of their products. Time is spent ensuring they can lead a lost user through the information to the answer they seek while teaching about searching and online access along the trip. Donna Ives said that successful trainers in the legal market should be sure to know their audience; use good probing techniques to find out what the user is seeking; listen closely for cues and comfort levels; and think quickly on their feet and react to their audience. Karen Kirk encouraged the audience to send new users to the help desk of the product. The help desk will re-train the user and move them from print to online research. An important message reiterated by one and all was that the helpdesk is included with our subscriptions—be sure to send your patrons there for help! Training results in more efficient use of the product saving time and money. One of the most important questions to ask a user is: "what are you trying to accomplish?" They noted that often information seekers are looking for one document, or one answer. Help desk operators are trained to encourage the searcher to broaden their expectations.

None of the presenters used PowerPoint. Handouts from BNA and CCH were available. CCH provided a five-page *Frequently Asked Questions and Contact Resources* guide. BNA had prepared and submitted to the AALL Handout Materials Collection, a list of frequently asked questions and comments culled from their database of customer comments. One of the top ten memorable questions not included on the handout (which received a hearty round of laughter) was "does the CD have to be in the reader for me to access it?" The scope of the product is another common question for the help desk.

Several questions in the handouts were about sharing ID's or how to get a user ID and how to subscribe to email newsletters but the meatier questions were about searching. BNA's handout explained that the user could click the "Search within a Search" link to narrow search results. BNA's Classification Number is part of the Classification Outlines. Each point of law in a case has been assigned a Classification number. Use the Headnote Finder link on the Home Page to utilize the Classification Numbers and Outlines. The "About" feature on a Library page will reveal the beginning dates for cases to be included in that Library. The Case History can be found in the front matter of a case, following the case's Headnotes and right before the full text of the decision. The content of the printed Advance Sheets can be found organized by topic within a BNA library by clicking "Most Recent Cases."

The CCH handout stated that a search could be narrowed simply by checking the boxes placed next to each searchable publication. They also explained that it is possible to search different libraries of publications at one time and to limit searches to the titles an individual uses regularly by preparing a customized list of titles to search on the "My CCH Tab." CCH continued by explaining the effect of Boolean connectors in Quick Reference. If you want to retrieve documents containing a phrase, then use a space as a connector. Use "or" to find a phrase containing either term or both terms. Use "w/n" to retrieve documents containing the first term either proceeding or following the second term by no more than "n" words. Use "w/sen" when retrieving documents with terms within 20 or fewer words of the second term. Use "w/par" for terms with in 80 or fewer words of the second term. Use "and" to retrieve documents with both terms and "not" to retrieve documents with the first term but not the second. There is a segment-restricted search available as well which makes it possible to focus searching on the Heading, Case-name, Headnote, Ircref (cases & rulings related to a code section), Uilinfo (letter rulings related to a code section), Between dates, Before and After.

The CCH handout also gave an overview of research in their print publications. They listed their finding devices: Rapid Finder Indexes; Topical Indexes; Tables of Contents; Current Topical Indexes; Case Tables, Finding Lists and Cumulative Index. The research workflow suggested by CCH recommends beginning with accessing the finding devices; go to that page number within the Reporter or Guide; review any overview information; locate the specific paragraph and determine if it is on point, if so, review related citations; once all documents have been read and reviewed, check for New Developments on point; and finally check the cumulative index to locate paragraphs that are cross-references to the paragraphs located in your search.

After the presentations were completed, the floor was opened to audience questions. Thank heavens for the microphone set-ups! It certainly made it easier to hear the audience members. There was lively discussion and exchange of information. Several members of the audience shared their frustration with moving the emphasis of training from books to online access, especially with those members of their organization who resisted the change. Once again, the message to have users call the help desk was repeated. “You pay for it – use it!” Others made suggestions about what works in their library, which the presenters stated they would take back to their help desk trainers. It’s good to know that our experiences in the trenches are valued. The representatives were very respectful of the audience as librarians, users, and trainers. There was never a sense that they were grudgingly dispensing secrets, rather, they were at the meeting for the purpose of learning from us and supporting us.

Program Report

Electronic Preservation: Does Losing the Past Challenge the Future?

*Reported by
Pat Turpening
Booklover Consulting LLC*

The Association provides a valuable service in presenting multiple opportunities for members to learn about this subject vital to our profession. As moderator Jonathan Stock clearly stated at the outset, it is easy to define the problems in preserving digital data—no one knows how long it will be readable. Much as librarians in the 1970s through 1990s were confronted with the inevitability of most book paper destroying itself due to its inherent acidity, librarians today are trying to grapple with the very real possibility of websites, emails, and databases gradually becoming unreadable. The difference, though, is that the ink in our books has not disintegrated into puddles on our shelves. That may be the equivalent of what is happening now with all things digital.

Jerry Dupont, well known to law librarians as the Executive Director of Law Library Microform Consortium (LLMC), indicated that law libraries are even more vulnerable than some may think. He has firsthand knowledge that libraries are giving away their books in droves. Why? Space and money. Libraries convert to digital, and they toss their books. Library space is needed for other purposes in law firms and law schools and, anyway, it’s all available online, isn’t it? Dupont asserted that those actions place libraries in a vulnerable position.

An additional concern is malware. One-tenth of computers in the U.S. are infected with botnet. Unbeknownst to users, computers are used in a network to spread spam. Now only annoying, the infected computers could be used for military purposes against our country. The belief of LLMC is that both digital and analog systems need to be maintained until we absolutely know that analog is no longer needed. As Dupont stated, “hoping that something doesn’t happen isn’t a preservation strategy.”

Victoria Reich, Director of LOCKSS (Lots of Copies Keeps Stuff Save), next spoke on the benefits in her system described as open source and decentralized with free downloads. Preservation threats are of three types: format obsolescence; failure of media, networks, software, hardware, and natural disasters; and operator error (60% of attacks come from within organizations). A mission of LOCKSS is to eliminate central points of failure, by building a redundant system that fails slowly. Reich spoke of “bit rot,” a horrendously damaging cancer than randomly turns 1s into 0s and vice versa. Moreover, it is impossible to determine precisely where data is on the spectrum between 100% good and 100% ruined. LOCKSS preserves only content that is web published for which format obsolescence is “not a big deal.”

Reich praised the “tremendous preservation system” of print libraries, calling them robust and “self-healing” by virtue of the interlibrary loan system. We are losing this robustness, however, since we now lease rather than own some portion of our holdings. The motivation of LOCKSS is to keep libraries relevant.

Third speaker Mark Evans of the British company Tessella Support Services emphasized the importance of preserving the authenticity of records. He stated “[we] must provide continued access to an authentic copy of an electronic record in perpetuity.” Tessella has produced solutions to the potential disaster of losing digital data, using strategies to cover all options. Evans pointed out that electronic records differ from paper records in that they have multiple structures and multiples views. There is no one-size-fits-all solution regarding digital preservation. It is important to understand the preservation needs and objectives of projects and how those evolve over time. Evans provided several examples of projects on which Tessella has worked. The UK Digital Archive has used format migration; the Dutch National Library has used emulation; open-source

Planets is a European consortium developing tools for migration and emulation for museums, libraries, and archives; the Florida Center for Library Automation is a dark archive using migration.

Refer to the websites for each speaker to see details on their mission statements and projects:

<http://www.llmc.com>

See the April 2007 Newsletter to read about the new long-term contract to store up to 200,000 volumes in salt mines in Hutchins, Kansas, said to be ideal storage conditions in the event that the bound volumes ever need to be reformatted.

<http://www.lockss.org>

“Seven million pages of new information are added to the world wide web each day... academic libraries are faced with the urgent problem of creating and maintaining digital collections with the staying power of traditional hard copy books and journals. Information stored on paper can survive for millenia; information stored digitally today may not be recoverable next week.”

<http://www.tessella.com>

Click on Services. Under Solutions, click on Digital Preservation. There are 18 technical articles, case studies, capabilities statements, and news. Under Publications, and Technical Supplements, see “Archiving Electronic Information.”

Program Report

Rise to the Challenge of Publishing

*Reported by
Elizabeth D. Bradsher*

So... You Want to Get Published

Presenters: Barbara A. West, coordinator and moderator, Western New England College School Law Library; Michael G. Chiorazzi, speaker, University of Arizona College of Law Library; Penny A. Hazelton, speaker, University of Washington Gallagher Law Library; Frank G. Houdek, speaker, Southern Illinois University School of Law

One of the most informative workshops offered this year at the AALL annual meeting in New Orleans, was the workshop “Rise to the Challenge of Publishing.” The panel members were some of the most established writers and editors in the law library profession.

Barbara A. West, Associate Dean for Library and Information Resources at Western New England College School of Law, served as moderator and coordinator for the program. This program was a panel discussion with a follow-up of questions taken from the audience. The panel speakers were Frank G. Houdek, Associate Dean for Academic Affairs and Professor of Law at Southern Illinois University Law School, Penny A. Hazelton, Associate Dean for Library and Computing Services and Professor of Law at University of Washington Law School, and Michael G. Chiorazzi, Associate Dean for Information Services and Professor of Law and Information Resources and Library Science at the University of Arizona Law School.

Topic Selection

Topic selection was the first item discussed by the panel. Frank Houdek emphasized that a writer should write about a subject that he is interested in or passionate about. “Writing is a difficult process even if you are very good at. The amount of time and energy spent on research, organization and writing can be overwhelming and if you are not interested in the subject you are writing about, it is going to very difficult.” Houdek also stated “as an editor, I can almost always tell whether or not a person is really interested in the subject [they are writing about]. It makes a difference in your writing. If you are interested in it, then it is good enough to write about. We [as editors] are trying to build a body of literature that covers many subjects. Do not worry if you have an audience for your writing. That is an editor’s decision.” He also talked about the different articles that he has read over the years and how the passion of the writer influenced his reading and interest in the article. He stated that the writer “brought me over into the subject and it [the article] caught my attention.”

Professor Houdek also advised writers to not choose a topic because it is a “hot topic.” He stated that many writers think editors will only want articles on a “hot topic” and writing an article based on this assumption usually does not work well.

Penny Hazelton also agreed that a “hot topic” was not the best subject to write about unless the subject was something that really interested the writer. She also suggested that the writer put himself in the position of being a new professional and

ask what subject a new library professional would need or want to know about and how it could impact the law library profession?”

One of the courses that Penny Hazelton teaches is “Current Issues in Law Librarianship.” In this course, she teaches students to write about things that people will need or want to read about in ten or twenty years. “We are in a dynamic and fascinating time in our profession and the information literature that was so stable and consistent and easy to deal with has completely turned around.” Professor Hazelton is anxious to see people write about things that will be benchmarks or measuring sticks that can be used in the future. Michael Chiorazzi agreed and said that part of his mission as the editor of *Legal Research and Services Quarterly*, was to fill in the gaps that all journals have. “I look at the other journals like LLRX for base knowledge that new librarians need to know about the profession.”

Another way that a writer can find a topic is to see what has already been written about it. Librarians do an enormous amount of research for other people and using that research can help to determine if a subject has been fully explored. One panelist stated that many times while doing research, a librarian will discover gaps in the literature and some questions that cannot be answered with the currently available literature. When that happens, a writer has the opportunity to do further exploration into an area and publish the findings.

Applicability

Another important aspect of topic selection is its size, manageability, and applicability to the profession. Professor Chiorazzi stated that one problem he frequently sees is that people will write about how something was done at a particular institution. He stated that these can be great articles but they need to be brought into a larger context. “If an article is jurisdictionally specific, it needs to have general application to other areas.” Otherwise, it may not have the appeal that an editor or journal is looking for. One way to find out if an editor is interested in an article written on a subject is to ask him or her. Professor Hazelton suggested that the writer submit an outline to the editor to find out if the editor thinks it might be of interest to the journal’s readers.

The Managing Factor

The key to a great article is to narrow the topic down so that it is manageable.

Professor Houdek said that “widening the scope [of a topic] too much might result in the author not doing an article justice. One of the most intimidating feelings that a new writer has is that he doesn’t know enough about a subject to write about it. A writer can actually spend so much time on the research for the article that the writing actually never gets done.” Professor Hazelton suggests that if the subject of a paper is broad and it is difficult to say all that needs to be said about the subject in one paper, then the writer should consider breaking it up into three smaller papers. By doing this, the writer has created a more manageable project and has avoided the overwhelming task of trying to manage the unmanageable.

The Determining Factor

All panel members agreed that the length of an article can be a determining factor in which journal it belongs in. Some journals prefer shorter articles while others only publish longer pieces. To determine where an article might belong, it is important for the writer to pick up a copy of the journal that he or she might be interested in submitting their article to. By reading the author guidelines and looking at the types of articles within a journal, a reader can identify the correct journal to target for their article. Editors often get articles from writers that do not fit the usual article type and length for their journal. When that happens, editors can usually tell that the writer has never read the journal before. The advice of the panel members was “to pick up the journal you are trying to submit the article to and read it.”

The Write Stuff

The next item that the panel discussed was the actual writing process and how to develop an article. One question that was presented to the panel was about articles that include data analysis. Professor Houdek responded that one of his pet peeves was when an article described in intimate detail how data was gathered, reported the results, and then stopped there. “A lot of time and effort is put into thinking about the article and researching for it so it is important to keep in mind that you have to do more than just list the results. You need to share your analysis with the reader.” Another major problem that Professor Houdek discussed was when the author does not recognize or acknowledge the audience that he is writing for. “You need to have an audience in mind when you write. Have an idea of where you would like to have an article published. After you do this initial step, then you need to look at who and what the journal is written for. This can affect how in depth you are on a subject. If you are writing an article and make a reference to something that every librarian will probably already know, then you shouldn’t spend a paragraph explaining what it is. If you are submitting the same subject or article to a journal that would not be familiar with the reference, then you may need to go into more explanation.”

In the development of an article, two of the most common mistakes that a writer makes are failure to have a solid useful introduction and conclusion and a failure to provide analysis. Many of the articles submitted to Professor Houdek include plenty of description but not enough analysis. “The reader wants to know right up front what is going to happen with an article so it needs to have a good introduction and be professional in nature. If the topic sentence is not stated right away, the reader will put it aside. A reader wants to make a decision as to whether it is worth his time to read it.”

Houdek also finds that some writers are not comfortable and familiar with the literature they have read. The writer needs to be able to synthesize the information he has culled from the literature review so that his article can be fully developed. The writer has to be able to incorporate the literature into his own article in a way that makes sense and is relevant. “It is not necessary to give a synopsis about every article that you read for the review. A writer needs to quote or briefly discuss any article that is relevant to a particular point within his paper.”

Professor Hazelton discussed her ideas about the process of writing and suggested that a writer “think about the various things that you need to do as a writer. The first is to have an idea or a thesis, do a literature research and then set some self-imposed deadlines. Writing an outline is an excellent way of helping establish deadlines. This also helps you to organize what is in that paper and will determine where you will need analysis and conclusions. After you write an outline, do a rough draft and then give it to someone to look at.” Professor Chiorazzi agreed but added that if you cannot make yourself stick to those types of deadlines, writing for a deadline such as the AALL Lexis Call for Papers is an excellent way to accomplish writing that is set outside of yourself.

Another important part of getting a paper ready for publishing is the editing process. Professor Houdek stated, “There is no paper that you could write that will not be better with review and comments made by your colleagues. It is important to give others a chance to read and comment and help you think about where you need to expand. By doing this, you’re writing can be improved. They can help you see where ideas are not being expressed clearly to the reader.” Professor Houdek also added “as a writer, you have all sorts of ideas on paper as well as in your head, but as a reader, all they have is what is written on the page and if it is not clearly written and expressed then the idea is lost to the reader.” He suggested having multiple people read a paper to make sure that it is clear to its readers. He stated, “[he] has read many papers (as an editor) and he can usually tell a paper that has had multiple readers editing it as opposed to no one editing [the paper] other than the writer.

Where to Publish

Professor Hazelton stated that there are a lot of places to publish shorter pieces. Examples are state bar association publications. “There are hundreds of topics that can be relevant to those journals and someone could publish an article every week if they wanted to. Other journals outside of the law library literature could be a great source. You have knowledge and expertise that needs to be shared with professionals outside of librarianship. Web pages are a good start. Another good place to start is in the journal, *Perspectives, Teaching Legal Research and Writing*. “It has articles dealing with tips about writing and the articles are generally 5 to 10 pages in length. Research guides and quick bibliographies of resources on the most recent changes in laws within your state can be a great place to start.”

If a writer is more experienced, he can build on a topic or article that he has already written. One of the presenters stated that, “once you have written an article, you will have more confidence in your writing. You are prepared to broaden that topic out.” The example given was of Bob Berring, who has made a career rewriting and expanding on his own articles. “He builds on his own articles.”

The program, “Rise to the Challenge of Publishing” was informative and addressed many concerns and questions that both beginning and experienced writers have when they are writing for professional journals. The panelists offered a variety of ideas and a wealth of personal experiences for their audience. Finally, the panel format for this particular program was an excellent way to encourage audience participation and those in attendance were enriched by the format because they had an ability to ask questions that could be answered from a variety of viewpoints.

Continued from page 1

to its struggling economy by bringing tourists back into the city, even for a short time. Additionally, I send out kudos to all of those that participated in the service projects prior to the conference—you are an inspiration to us all. I also truly want to thank those on the Awards Committee who chose me as the TS-SIS VIP. This was a very special conference for me, and it is *you* who made that possible.

Program Report

Meeting the challenges of E-life Cycle Management— a Town Meeting with the U.S. Government Printing Office and National Archives and Records Administration

*Reported by
Craig Lelansky
Georgetown University*

This town meeting has been held for the last several years and continues to be a fairly well attended AALL program. Three distinguished government speakers, Kenneth Thibodeau, Richard Davis, and Michael Wash discussed their agency's initiatives. The over arching goal of both agencies is to provide sustainable, authenticated access (E-life cycle management) to federal documents using their systems, something that the AALL members have been supporting for several years.

This year, both GPO and NARA (National Archives and Records Administration) will begin to implement important new digital initiatives: the Future Digital System (FDsys), and the Electronic Records Archives (ERA). These initiatives hold the promise of meeting this important goal.

Kenneth Thibodeau led off the panel discussion talking about NARA's efforts in management of the electronic material that needs to be processed and potentially accessioned into the Archives. He gave some brief background information about how the archival life cycle management of all records is handled. NARA works closely with federal agencies to create a disposition schedule that establishes which non-current agency records are to be retained in the Records Centers to serve agency and public research functions, when these records are disposed of, and finally which records are considered historically significant enough to be permanently retained in the Archives. Only about 2% of government records are determined to be historically significant by NARA and will be permanently accessioned. For these permanent records NARA provides description, arrangement, preservation and provides public access in NARA's research rooms. Obviously electronic records are an ever-growing part of this flow of materials processed. The Electronic Records Archives (ERA) is designed to be a dual system—one that will help automate the workflow of material received into NARA, as the Records Center currently do with the paper component, as well as using it to transfer, store, preserve and provide access to the permanent electronic records. This is a grand undertaking indeed.

Mr. Thibodeau gave some very interesting statistics and facts about why the ERA is so crucial to the agency's future records management. The executive branch alone gives a good picture of what is happening with the current and potential future materials to be processed by NARA. President George H.W. Bush's administration delivered some 200,000 emails to the Archives. President William Clinton's administration sent some 38 million emails, and for the current President George W. Bush, the Archives expect about 10 times that many to be sent at the conclusion of his presidency. Not only have the pure quantity of the e-documents increased dramatically but in today's digital world, as we all know as librarians, the demand for immediate access to this electronic government data will be felt just as soon as the records are transferred to the Archives. The public researcher will not wait 2 or 3 years for NARA to process this information. In response, NARA has spent \$130 million dollars (about 50% of NARA's total annual budget) and President Bush has asked for additional funding of \$58 million for fiscal year 2007-2008. The ERA is set up to start taking these presidential documents, along with selected additional selected agencies' electronic records at the close of the current administration. This is essentially the first incremental rollout of the ERA. The system will enable NARA staff to accession more quickly these digital records and the idea is have public access in 2009 and have continued improvements and expansion of the system annually.

In conclusion Mr. Thibodeau indicated that ERA is designed to ease access to e-records, be one stop shopping, and truly help manage and preserve the life cycle of e-records. It will be a dual system, one for classified documents to be used by NARA staff and other qualified Federal employees and the other for the public researcher. One of the key roles for librarians will be as brokers to enable easier access to NARA's digital materials. For more ERA information visit NARA's website at <http://www.archives.gov/era>.

Rick Davis, Acting Superintendent of Documents, Government Printing Office (GPO), started with a brief story that as GPO Access came into being in 1994. A member of Congress stated the his life should be getting much easier now that everything will be on GPO Access. He went on to say that he would no longer have to worry about it. After 13 years Mr. Davis is still waiting for this to happen. Mr. Davis provided information about where GPO is today we are and the challenges of the future digital system. In 2007 GPO is managing a collection of information called GPO Access, where 92% of FDLDP distributed material is also available online. The age-old problem still exists, no matter how many people he throws at the problem, GPO still cannot identify all the fugitive government documents. The hope is that FDsys will an important tool in capturing these electronic agency documents.

Partnership and cooperation with agencies and libraries is more important than ever. In a conversation with an agency official a few years ago the topic of permanent access to that agency's information posted on its website was broached. When asked how long the information would be available, the official responded that usage statistics would dictate that. When the information is no longer in high demand, it will be taken down. This of course was not the answer for which Mr. Davis was looking. In response, GPO in its role of providing ready and free access is entering into formal agreements with agencies ensuring that when agencies take information down from their sites, that GPO will serve as a backup source to continue to make this material available. The public needs to be assured that GPO is preserving this information.

Mr. Davis outlined a series of challenges (that all librarians know) that face GPO. One of challenges is simply to replace the WAIS system with one that answers the concerns of the GPO staff and its users. Another is to provide a better search engine for the public to use. The challenge of authentication of government information on the web also needs to be addressed. In addition, GPO has to develop a system to identify all the versions from point of creation to the current document on the system.

Michael Wash, Chief Technical Officer at GPO, was next to speak. He discussed the ways that FDsys could be at least *in part* the answer to these challenges. GPO started a few years ago with a functional model for printing and publishing services and it is still applicable today. The system needs to be able to harvest, digitize, and make accessible government materials. In addition, it needs to be able to create digital content for materials that originally printed to truly make the FDsys a valuable tool.

How will it work in theory? Government agencies would deliver content to GPO (interestingly GPO can not refuse to accept any publication offered by agencies), where it would be added to the system. GPO staff would then use the system and engage in activities needed to accept, catalog, index, preserve, and finally provide access to the material. With respect to authentication, GPO regards this system much like they handle print materials. The agency that supplies the material is the authority. GPO only prints the material. In the FDsys, GPO will accept the material and be able to provide a chain of custody that will make it as authentic as any material printed by GPO. Like most major systems, FDsys will be offered in a number of incremental releases. Release one is currently up and running as an internal pilot project that is being used to enter data and manage the materials presently entered. The next release would be the access tools for the public to use, scheduled for 2008. The releases in the future will be about a year apart. For more information, see at <http://www.gpo.gov/projects/fdsys.htm>.

In all the talk about the digital environment that GPO is engaging in today, Mr. Davis made it clear that the FDsys was not replacing the printed document. As he said "printing" is our middle name and the GPO administration see print lasting for some time to come. High volumes titles like the CFR, Federal Register, and Congressional Record will continue to be printed by GPO. Its function is seen as allowing the public to essentially print on demand needed government documents.

As it was a town meeting, I recorded a couple of the questions and answers that were at the end of the presentations:

Will FDsys documents be "official" when they become open to the public?

Mr. Davis comment was that whether of not a document is official is an agency function and that GPO's function will provide the assurance that after they have received the material that it is not changed – much like they do in the print environment.

Are there mirror sites for post-911 security?

The NARA backup site is at a Naval base in the Gulf Coast region. It has its own generator and even during Katrina, it never lost power. GPO has plans for two other sites. One in the Washington, DC metro area and the second is planned to be at least 600 miles from DC.

I am not sure if it was that because so many of the items discussed here were not totally new or have been discussed so many times, or that I have been personally been to several of these meetings, or maybe that our old friend Bruce James was not speaking, but to me the meeting lacked the usual fireworks of interaction between GPO, NARA, and the librarians present. Maybe when the systems actually "go live," will additional discussion and comments be forthcoming from our library community. Only time will tell if these systems will work as planned.

Program Report

Legal Publishing in the 21st Century

*Reported by
Margaret K. Maes
University of St. Thomas*

This year's Hot Topic program featured several top executives in the legal information industry in a relatively informal conversation about trends and challenges in legal publishing today.

The session was moderated by Jim Heller (William & Mary) and Sally Wiant (Washington & Lee). The panelists were MaryKatherine Callaway (LSU Press), Stacey Caywood (Wolters Kluwer Law & Business), Scott Livingston (LexisNexis), Andy Martens (Thomson/West), Dick Spinelli (William S. Hein & Co.), and Paul Wojcik (BNA). The program was presented in a question-and-answer format, with the moderators asking a series of questions of all the panelists, although some questions were not relevant for all participants. In general, BNA, Wolters Kluwer, LexisNexis, and Thomson/West had similar answers to most of the questions, while Hein and LSU Press had different perspectives.

Audience members had an opportunity to submit their own questions, and a few of these were included near the end of the allotted time. Following is a summary of the major topics of discussion.

Primary Market, Product Development, and Pricing

BNA, Wolters Kluwer, LexisNexis, and Thomson/West have similar primary markets, namely tax professionals and legal professionals in private practice and government.

Hein markets primarily to academic libraries, although they serve other types of libraries as well. LSU Press markets their products to retail outlets, chain bookstores, libraries, and directly to scholars.

BNA: Their primary market includes attorneys and tax professionals, but they also serve legal professionals in the environment and safety field, human resources, and investor relations. BNA creates content, and they attempt to create new, proprietary, unique, and hard to reproduce content that other publishers are not creating. Their products are priced according to the cost to produce, the availability of competing products, and the value of the information to the markets they serve.

WKL&B: They serve legal professionals within law firms and corporations, law schools, and federal and state government. A lot of their markets are very well served already, but they are constantly working with their customers to create new products and enhance existing products. When pricing products they are interested in understanding the value of the information to the market they serve, what their competition is producing, and the unique value of their content.

LN: Their market includes knowledge workers and librarians in government, academic settings, law firms, and corporations. Product development is formulated around those segments. LexisNexis is both a content creator and a content aggregator; they attempt to move beyond simple aggregation and focus on research solutions rather than individual products. They use focus groups and customer feedback to inform product development. Their pricing model is similar to BNA's response.

T/W: Legal professionals in all sectors are their primary market. Product development focuses on the specific types of people who are going to be using the product. They are mainly a content company, but they are also expanding into litigation support areas. Pricing = value to the market + cost to produce.

Hein: Academic law libraries are their primary market, although they serve other types of libraries as well. They price products according to what the market will bear, production costs, and potential sales.

LSU: They market their products to retail outlets, libraries, and scholars. They price digital and print products the same, because the costs to produce are the same. They are beginning to explore stand-alone digital content, and pricing will probably be based on cost to produce.

Challenges Facing the Industry

WKL&B: A general challenge is making content available electronically, with added value and with their own editorial voice and quality, to compete with content that is freely available on the Internet. More specific challenges for Wolters Kluwer are aging systems and keeping up with the technology to deliver their products effectively.

Hein: For a small publisher, the biggest challenge is fighting for dollars in the marketplace when budgets are flat and costs are rising.

BNA: Franchises are always at risk in the digital world throughout the industry. Specific challenges to BNA are the cost of technology, recruiting and retaining editorial talent, controlling costs, and web competition.

LN: The digital world has lowered the barriers so more free information is out there competing with commercial databases. This is an issue for the consumer, but it is also a challenge for the industry to provide content that is reliable, authoritative, unique, and premium. For LexisNexis, as a large and mature company, one of the most significant challenges is striking the proper balance between being nimble and cutting-edge, and being stable and reliable.

LSU: It is a challenge to produce high-quality scholarship cost-effectively and keep up with the innovations that technology allows. They are not-for-profit, so they can't lose money endlessly. Their initial print runs are less than 1000 copies on most titles, as compared to 2000 in the 1980s.

T/W: The biggest challenge for all companies is to focus on what unique value they add to their information and services. A more specific challenge for Thomson/West is to stay easy to work with even as they grow. When they buy other companies, trying to integrate them into the larger organization without destroying what made them good in the first place is very difficult.

Future of Small Presses

LSU: The mission of the university press is directly tied to the university. University presses are non-profit, and they publish mission-driven works that tie in with goal to educate and inform, and that reflect the university's larger mission. LSU Press will remain viable because no one else is jumping in to fill that niche.

Hein: The future is bright if Hein can stay independent, continue to create and serve a niche, do it well, and listen to their customers. They are very market-driven, but they are small enough that they can respond quickly to the needs of their customers.

BNA: Being a smaller company does have some advantages. BNA will succeed by sticking to their core competency, which is creating content, but they need to be business partners with the bigger companies in order to get the content out there. BNA puts more resources (in terms of business revenue) into content creation, but they make that content available on the platforms of other companies so the partnerships are very important.

Relationships Within Conglomerates

T/W: Their corporate environment is not really international, but rather multi-domestic. The parent company sets revenue targets and the like, but domestic companies run the way that suits their markets and product lines.

LN: Reed Elsevier is an Anglo-Dutch, multi-domestic corporation, with LexisNexis headquartered in the United States. Revenue targets are set fairly high up in the organization, and significant acquisitions that would radically change the organizational profile also are determined at a high level. The daily business of planning, marketing, and sales activities is handled locally. They try to make decisions at the lowest possible level to keep the company nimble and to address the needs of the various market segments.

WKL&B: Wolters Kluwer is a Dutch company with an American Chairman of the Board and four separate business units. Broad strategic vision and financial targets are set at the top, but markets are handled by individual units as locally as possible. They focus on trying to get as close to the customer as possible in order to understand customer workflow and needs.

Impact of Consolidation

This multi-part question addressed the number of titles being published, titles with divergent views being published, price increases generally, and the impact of less competition on prices.

T/W: West is not publishing fewer print titles; internally they have taken a declining product line and turned it around so they are publishing more print titles. Consolidation does not necessarily mean higher prices; there are some instances where efficiencies can be gained through consolidation or working with other publishers.

LSU: University presses are not publishing fewer titles, and they are trying hard to maintain divergent titles.

LN: There was some constriction in print publishing in the 1990s, but publishers are recognizing that print is still a viable medium. There are more divergent views, but they always need to add new voices. Consolidation does not always bring higher prices, because economies of scale can achieve savings.

WKL&B: They are investing in technology to support greater electronic offerings, more voices, and better taxonomies. They are expanding online content but finding that customers still like print for treatises, and they have reinvigorated their print offerings. They evaluate both print and electronic delivery when developing new products, and they will continue to publish in all media.

Hein: They are probably producing less print than they once were and are focusing more on their reprint market, partly for cost reasons. With consolidation, prices were higher early on, but the market has righted itself.

BNA: The number of print products they publish is not decreasing, but the print runs are. They also have the opportunity to start a new product as an electronic-only product, where they would not have started it as a print product because of cost. Competition does affect prices, and consolidation affects prices negatively.

Profit Margins

BNA: 12-13%

Hein: privately-owned, not public information

LSU: not-for-profit

WKL&B: 17% (per follow-up email)

LN: did not know [MKM: In a July 26, 2007 press release, Reed Elsevier reported 2007 1st half results. Revenues were up 6% at constant currencies, while the reported operating profit is 13% at constant currencies.]

T/W: did not know [MKM: In a July 26, 2007 press release, the Thomson Corporation reported 2nd quarter results. Revenues for the second quarter of 2007 increased 11%, and the company showed a 15% increase in operating profit.]

Program Report

Turning Challenges into Opportunities: How Law Libraries Can Capture and Preserve Government Web Resources

*Reported by
Rosemary LaSala
St. John's University Rittenberg Law Library*

At the AALL (American Association of Law Libraries) 2007 annual meeting and conference the program entitled "Turning Challenges into Opportunities: How Law Libraries Can Capture and Preserve Government Web Resources" given by Cathy Nelson Hartman, Assistant Dean for Digital and Information Technologies at the University of North Texas Libraries brought to the forefront the difficulties libraries and librarians are having with web published materials.

Librarians must select, acquire, describe, organize, present for access, curate, maintain, and deselect items for their libraries and the same process applies to web resources. The difference is that libraries and librarians have no control over web resources and therefore are not able to avoid losing important resources. Understanding the differences and then integrating the collection of web resource materials into your everyday workflow must begin immediately to avoid losing important resources.

As librarians, it is important to know what our users value as far as research material is concerned. Do our users want text, video, audio or multimedia versions of all material, and is the material available in all versions? Do our users really know what is important to them? These are the questions to which we, as librarians, must find the answers.

In the web environment how will we locate and identify web published materials, and when we do, how will we establish authority, how will these materials be preserved for future generations? We must be able to insure accuracy of captured material. Today when we capture information we can assume it is reliable, not authentic or official, but reliable.

Librarians planning for collection development encountered significant complications when government and other organizations began publishing important information on their websites. The University of North Texas, in partnership with the California Digital Library and New York University began a three-year collaborative research project to try and understand the collection development processes in the web publishing environment and to begin to create tools to support the capturing and archiving of web publications.

The Web-at-Risk project is one of eight digital preservation projects funded in 2004 by the Library of Congress to carry out the goal of establishing a national network of partners committed to digital preservation of cultural heritage materials. Each of the projects represents a collaborative effort to preserve for future generations born digital or digitized cultural heritage materials and collections. The project will develop a Web Archiving Service that will enable curators to build collections of web published materials. The content for the collections will be collected largely from U.S. federal and state government agencies, and will include campaign literature, political policy documents, and information surrounding political movements. For more information see the National Digital Information Infrastructure and Preservation Program (NDIIPP) at <http://web3.unt.edu/webatrisk/>.

Since all law libraries cannot support the technical infrastructure to implement web archiving services, collaboration is essential. Law libraries play an important role in selecting web published materials that will support the study and practice of law. Therefore, librarians must review options for local and regional organizations that might support these efforts. Until these groups are formed, the Archive-It service at <http://www.archive-it.org>, sponsored by the Internet Archive provides immediate access to a web archiving service.

Program Report

The Future of Cataloging

Reported by
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School of Law Library

It works well in practice, but does it work in theory?

—Michael Gorman, AALL conference, New Orleans, Louisiana, July 17, 2007.

This program featured Michael Gorman discussing the future of cataloging. Michael Gorman well-known to most of us: prolific author on library issues, a past president of ALA, one of the editors of AACR2, and recently retired University Librarian for the California State University at Fresno. As always, Michael Gorman was opinionated and thought provoking in his discussion of the current trends and development in cataloging.

Gorman's talk ranged over the current trends that say that library catalogs are too hard for students to use; that people want more out of the catalog; and, that "online catalogs suck." The current trend is to use keywords to search the catalog the way that the commercial databases work. However, Gorman pointed out that catalogs are designed to facilitate searching and that the belief that organized structure is passé is ludicrous.

He then discussed the three essential attributes of both types of cataloging (descriptive cataloging and subject cataloging):

1. Controlled vocabulary—standardized language.
2. Authority files to document the controlled vocabulary.
3. Synthetic structure to show the relationship between different topics, persons, places, etc.

Without these three principles, Gorman says you are not doing cataloging, you are creating a very inefficient retrieval system.

This led to a discussion of the history of cataloging codes culminating in the Paris Principles and AACR2. AACR2 has become the defacto international cataloging code with universal bibliographical control now possible and achievable. Now, however, we hear how we cannot afford standards anymore because our administrators (with a nod to Oscar Wilde) know the cost of everything and the value of nothing. Gorman stated emphatically that the fact is we cannot afford to do without standardized cataloging.

Gorman then turned his attention to metadata, Dublin Core, MARC, and the current Library of Congress administration. He pointed out the ridiculous ideas put forth in the Calhoun report and how this was clearly what the LC administration wanted to hear. He also cited Library of Congress reference librarian Thomas Mann's eloquent responses to these changes at LC and how he is unable to do his work with these changes. Gorman also commented on the working group that LC set up after the serials authority debacle and he said that there is a message for us since that working group's first meeting was held at Google headquarters in California.

Finally, he discussed RDA and here again he did not mince words. Simply put, he believes that RDA is a fiasco and with

hope, it will just fade away. He concluded with the exhortation that we need to be vigilant—watching the Library of Congress closely and demanding that they continue to support standards and cataloging because “you won’t know what you’ve got until it’s gone.”

If your library purchases it, I would recommend listening to Michael Gorman’s talk on the CD. In fact, I purchased my own copy of it. Michael Gorman is opinionated on this topic and rare for a library administrator that truly does understand cataloging. We should heed his words and warnings.

Program Report

Reported by

Katie Jones

Developing a Scholarly Agenda

Wyoming State Law Library

Professor Kathryn Lorio packed a *lot* of information into the very short time allowed for this presentation. If you were looking for a guide to organize (or bring back on track) your ideas for writing, this was the program for you.

Barbara Bintliff of the University of Colorado Law Library, coordinator and moderator, introduced Professor Kathryn Venturatos Lorio, a Loyola College of Law professor, for this program. Handouts included a “Highly Selective, Occasionally Annotated Bibliography” compiled by Barbara, and an outline from Professor Lorio, both of which will prove to be helpful guides. Lorio presented with a power point that followed her outline, but contained much more information—too much for this reporter to write down since she had to speed along to make the time limit.

Lorio stressed the need to develop an agenda to enable expansion of a topic from just one or two articles to encompass broader possibilities over a more extended period of time. The included outline covered suggested questions and ideas to ponder when embarking upon a scholarly journey. Nine main points were covered: (1) why do this; (2) topic selection; (3) article type; (4) plan and organize; (5) where and when to publish; (6) working with the publisher; (7) marketing; (8) acknowledgments; and (9) savor the moment.

First, determine what the reasons are for the adventure. Is it simply that you *must* (tenure requirement) or, that this of interest to you, or perhaps a by-product of on-the-job-training in a specific area? Either one of these can be great motivators, and will definitely aid in your next courses of action, the next being to choose a topic. Has there been some research in your area of interest, or is it so new there might not be enough already written for you to attempt? Can you offer a new twist? Is there a glaring emptiness in the subject, waiting for your research and conclusions? Maybe there is something happening outside your professional life, the interest in, and knowledge of, which has ramifications for a scholarly agenda? Is the field not only interesting to you and others, but is it feasible? Does it have potential?

Once the topic has been selected, you can begin to plan the type of presentation. As Professor Lorio notes, this will often depend on the level of expertise and whether the article has been solicited. She suggests that if this is an introduction of the topic, a traditional doctrinal analysis would be best. Then later in the plan, empirical and interdisciplinary analyses may be entered.

This is where the “easy” decisions end and the hard work begins. It’s time to begin research and start writing: gather sources [shameless plug for law library—have journals in your field of interest routed to you as they are received], keep a schedule, use outlines (helps to divide topic into smaller, logical bits), draft and redraft (keep all files and footnote as you go), keep records (copies of sources, lists of readers and their commentaries), and use any assistance you can get. Lorio works with a research assistant who not only helped with gathering, reading and formatting, but kept her on schedule as well. Eventually, it will be time to get some feedback (excellent means of networking for the future), re-redraft, and get ready for the final presentation. Don’t ignore the efficacy of a great title, consistent formatting (use sections), and providing an inviting cover letter.

If your article or presentation was solicited, this next step has obviously already been decided for you. While solicitation may seem like a boon, Lorio advised of some options to consider. Deciding where and when to publish can be tricky. You need to be aware of others’ perceptions when choosing a journal. But don’t let that limit your creativity. Consider sending an unsolicited article in the early spring when new editorial boards are more likely to be adventurous.

The hard work is about over, but it will all be for naught without these next three steps. Working with your publisher and marketing your results is key to the continuation of your efforts. This sounds like only so much common sense, but do not

underestimate the value in being generous, courteous, and NEVER backing out on a commitment. Keep track of the reception you've received, passing on your thanks and acknowledgments, remembering those who provided financial support as well as simple time and effort. Pay attention to the possibilities of redirecting your knowledge in other avenues, such as speeches and conferences. Make use of reprints—distribute them freely and often.

After all that, it's finally time to enjoy the rewards. You can revel in personal and professional satisfaction, as well as peer recognition, remembering to track your work through the citation of others.

There were two questions after the presentation. One participant commented on using Espresso for submitting articles and what Lorio and Bintliff suggested as far as adherence to formatting, especially concerning the *Bluebook* citation style. Both presenters strongly urged any author to strictly follow the guidelines requested by the publisher to whom you are submitting a work.

Another question touched on the target audience for the program itself. A participant asked if he should follow an interest in substantive law, even though he does not practice. Barbara's suggestion was that he should pursue the interest from a librarian's perspective. Perhaps he could compile annotated bibliographies or create pathfinders. As a non-academic law librarian, I appreciated this advice. While the audience for this program was intended for academic law librarians, the sensible suggestions can be used by anyone interested in authorship.

Program Report

OCLC's WorldCat: Our Collections at the World's Fingertips

*Reported by
Michael Maben
Indiana University, Bloomington
School of Law Library*

OCLC's WorldCat.org was one of the "hot topics" programs at the AALL conference in New Orleans, at least for OBS and TS. On Tuesday afternoon there was a 30-minute program with Mindy Pozenel from OCLC giving an overview of this developing interface. WorldCat.org is a continuation of OCLC's Open WorldCat program. OCLC states on their website that "Where Open WorldCat inserts 'Find in a Library' results within regular search engine results, WorldCat.org provides a permanent destination page and search box that lets a broader range of people discover the riches of library-held materials cataloged in the WorldCat database." The linked search results then enable a user to enter geographic information, which will lead directly to a local library's online catalog. This includes article citations that go through an OpenURL resolver.

Pozenel said that phenomenal increases in record searches and clicks to libraries have resulted with WorldCat (from 300% to 500%). She also reported on upcoming developments including open access material searching, and more social networking tools, such as reviews, ratings, RSS feeds, and maps.

The presentation then shifted to WorldCat Local which functions as a branded version of WorldCat.org. The local library's holdings will display first and represents interoperability with the local delivery environment, like circulation, ILL, or online full text. The system has been tested with the Innovative, Sirsi, and Voyager systems. Pozenel pointed to the University of Washington's website as the place to try out WorldCat Local at www.lib.washington.edu. She also stated that there have already been some changes based on the experience with the University of Washington libraries.

Program Report

The Future is Digital: Metadata Standards and Applications Workshop

*Reported by
Sean Chen
University of North Carolina at Chapel Hill*

Introduction

This workshop was designed as part of the Library of Congress Program for Cooperative Cataloging's 2003 initiative to update cataloging education and training, in light of the complexity of the modern information environment, and is just one in a series developed in response to that initiative. Diane Hillmann was the presenter, and William Benemann was coordinator of the workshop.

Over thirty catalogers and other librarians attended the two-day preconference workshop in New Orleans, devoted to

practically-oriented training and education. The workshop was designed for those in traditional libraries who need additional experience with metadata and digital libraries. The topics covered included metadata content and carrier standards such as Dublin Core, a whole gamut of XML applications, and interoperability applications and specifications, e.g. the Open Archives Initiative-Protocol for Metadata Harvesting (OAI-PMH). Overall, what was explored represented a combination of deep background, best practice, community consensus, and the bleeding edge of standard and application development for digital libraries.

Digital Libraries

We began the workshop with an introduction to digital libraries. Some significant differences and similarities between digital libraries and traditional libraries were discussed. One critical difference between them is the lack of a dominant content and format standard for data in digital libraries, unlike traditional libraries, which have AACR2 and MARC21 as agreed-upon standards. Other differences included stakeholders, goals, resources and differences in content responsibilities. Conversely, what do digital libraries share with traditional libraries? Both types of libraries have similar discovery aims, constraints, scope in terms of materials and services, and a tendency to overlook long-term maintenance and sustainability needs.

Defining Metadata

Metadata means data about data. One theme that emerged was that the functions of metadata are extremely wide-ranging and thus what actually constitutes metadata is similarly expansive. Hillmann classified metadata by usage: administrative, descriptive, access or use, preservation, and structural metadata. This demonstrated that there can be many uses for the same metadata, along with needs and uses that don't necessarily appear in a traditional library domain. On the other hand, Hillmann emphasized that both metadata and cataloging focus on resource discovery versus other functionality, such as content structure, authenticity, or intellectual property rights.

Cataloging vs. Metadata

One of the themes that ran throughout the workshop was a constant comparison between "metadata" creation and "cataloging." Is this a distinction without a difference? Is one activity a subset of the other? What do both disciplines share?

Cataloging has an underlying model based on practice and standards such as AACR2 and MARC21. Metadata has a fuzzier model, as expressed in the Dublin Core Abstract Model (DCAM). Under the assumption that *Resource Description and Access (RDA)* will also be usable for metadata projects, a more rigorous model is seen as necessary for fully consistent and interoperable metadata. However, both disciplines are roughly based upon attribute and value pairs, e.g. the publisher (attribute) of *TSL* is OBS/TS-SIS (value).

The big difference that the workshop emphasized was that catalogers are fitting their descriptions into an existing world of materials. On the other hand, metadata practitioners are working with a domain of description that does not necessarily have that constraint. Instead, metadata is being used in a more dynamic environment where the description (or "record") already exists and has been aggregated or created. The metadata practitioner needs to go in and make what already exists interoperable and usable in the information retrieval environment.

Hillmann offered some additional contrasts between cataloging and metadata. One important way in which the two differ is that metadata concentrates on batch processes, on sets of records rather than the methodical, individual record processes that characterize cataloging. Of course, metadata still needs to be created at some point, probably by underpaid graduate students or as part of a National Science Digital Library (NSDL) project grant.

Furthermore, the metadata batch approach includes an assumption of further enhancement. What constitutes enhancement? It could include format integration, error correction, duplicate detection, and other issues with which the bibliographic control world has consistently dealt.

Standards

Nearly all of the standards and applications we discussed have been designed to be carried and transmitted as XML. XML (eXtensible Markup Language) is strictly a generic container for data. XML has structural rules, but the content that the language encodes can be of a limitless variety. XML grew out of the SGML (Standardized General Markup Language) community's attempt to rationalize SGML for the web. One famous SGML application is HyperText Markup Language (HTML).

Since the 1990s, XML has grown into the lingua franca of the web, underlying the current explosive developments in websites, applications, and services. Probably the most common XML application is eXtensible HyperText Markup Language (XHTML), the XML version of HTML.

Schemas & Syntaxes

A schema is a set of meaningful property-value pairs that describe a particular resource. The workshop covered a whole range of metadata schemas that are commonly deployed. These include MARC21, Dublin Core, MODS (Metadata Object Description Schema), IEEE-LOM (Institute of Electrical and Electronics Engineers–Learning Object Metadata) and Onix for Books. We went into some depth exploring where various schemas originated and to which domains they have been applied. Notable to me was how the IEEE-LOM and Onix for Books schemas originated outside the world of libraries, instead coming from the learning technology and publishing communities respectively.

Syntaxes describe the structures which encode or encapsulate meaningful (meta)data. Examples of syntaxes include HTML, XHTML, XML, RDF and METS (Metadata Encoding & Transmission Standard). METS is interesting because it can handle the “heavy lifting” of relating and managing metadata and associated objects within digital libraries. It includes explicit ways of mapping structural elements between objects, such as the way a series of digital images should be collated.

Content Standards

Structural schemas and application syntaxes are useless without some understanding or standard as to what goes into a value. So, in traditional libraries, *AACR2* functions as an agreed-upon content standards. Metadata standards or specifications rarely make specific references to content standards, instead specifying generalized guidelines for content. *RDA*, *AACR2*'s intended successor, is being designed so that it can be used as a content standard for metadata outside the *AACR2* domain. We explored this point later in the workshop during a discussion of *RDA* and Dublin Core application profiles.

Relationship Models

The workshop included a session on relationship models. We went over the models which are commonly used in the library and metadata world. In chronological order we looked at: bibliographic relationships before the introduction of *FRBR* (*Functional Requirements for Bibliographic Records*), *FRBR* itself, Dublin Core relational models based upon the “One-to-One Principle,” and the ABC Ontology and Model.

Bibliographic relationships were the easiest model for me to understand as a cataloger. These can be as simple as the model defined in UNIMARC of vertical, horizontal, and chronological relationships among bibliographic objects. Bibliographic relationships receive a more sophisticated treatment with Barbara Tillett's formal taxonomy encompassing a larger range of relationships among objects.

The problem with these models is that they are limited in scope, dealing with the most common relationships among bibliographic objects. *FRBR* attempts to more abstractly model the relationships among bibliographic objects and, more specifically, records. One benefit of thinking about and having another look at *FRBR* alongside Barbara Tillett's taxonomy of bibliographical relationships was clarifying the organization of the recent July 2007 draft of *RDA* Chapter 7.

Bibliographic relationships do not necessarily model well to the larger world of description and access. The Dublin Core community, in a separate effort, has approached the problem of relationship modeling in a different way. The “One-to-One Principle,” in my opinion, backs off somewhat from a more universal model such as *FRBR*, and requires that metadata be associated with specific manifestations or versions. Unfortunately, that loss of universality results in a bit of a conceptual hole, and the Dublin Core community's model development efforts have evolved into the Dublin Core Abstract Model (DCAM). The DCAM is based upon the “One-to-One Principle,” but includes the concept of a description set. Description sets are groups of descriptions with their own sets of relationships which attempt to handle more abstract entities beyond a single manifestation or version. Conceptually, DCAM's “instantiation” of a description is equivalent to what a cataloger would consider to be a record. This separates the complexity of the statement values and properties of a single manifestation from that of the record.

Lastly, there was a short explanation of the ABC Ontology and Model. This model attempts to introduce an additional element of temporality by including additional subclasses of description as events, situations and actions.

So why look at relationship models? A significant critique of traditional catalogs is that there has been a huge difficulty in using relationship information such as reciprocal links in continuing resource records. Having a conceptual model when creating a metadata schema means that relationships can be organized and presented to users in a manner which supports functionality which doesn't necessarily exist now.

One real-world application of a relationship model is the inclusion of multiple versions of a resource in a single record. Another approach is having an entry page with a single generalized metadata record, but with other formats listed in a repeating format. In a more automated approach, controlled vocabularies can bring together related resources, the caveat

being that the vocabulary needs to be well-documented and understood by its users and developers so that functionality can be fully realized.

We ended the session on relationship models with a useful card-sorting exercise. This made clear some of the difficulties and challenges that can be encountered when establishing a relationship vocabulary and modeling a particular resource domain.

Interoperability

Another theme that ran throughout the workshop was the importance of interoperability. When Hillmann talked about interoperability she was referring to interoperability among schemas, standards and applications. In an ideal world, (meta)data could be pulled from systems in ways that would enable reuse, sharing, and scalability.

Interoperability requires standards and applications. The first component discussed was the OAI-PMH protocol, which describes applications which permit the interchange of metadata describing resources. Another component of interoperability is the OpenURL standard, which allows context-sensitive linking to appropriate objects. Simply put, it is a standard by which a bibliographic citation can be put into a standardized form fed into a service, which then provides a copy of the resource from a whole range of versions or locations.

Extensible metadata frameworks and models help promote interoperability. This means that some of the most important practices a metadata project can have include: standards adherence, planning for persistence and maintenance, documentation of controlled vocabularies, application profiles, exceptions, and community consensus.

As an example of documentation and application development we explored crosswalks. Crosswalks are transformations from one metadata schema to another. We looked at how crosswalks can lose data and how catalogers' expertise with semantic content can help in evaluating and using crosswalks.

Vocabularies

A familiar tool to catalogers is the use of controlled vocabularies. In metadata work vocabularies play a similar role: eliminating ambiguity, controlling synonyms, establishing hierarchy and relationships, and improving information retrieval. The session looked at differing types of controlled vocabularies including: simple lists, synonym rings, taxonomies, thesauri, classification schemas, and ontologies.

Hillmann emphasized the importance of registries and documentation for vocabulary issues. Registries provide a centralized repository where metadata standards and applications such as vocabularies can be used, documented, and offered as services. This enables interoperability and, ideally, a synergistic integration among differing schemas, standards and applications.

An example of a registered vocabulary is the proposed carrier material designation vocabulary for both machine- and human-readable formats that is proposed in *RDA*'s draft chapter 3. The fact that the vocabulary is available and maintained as a registry promotes its re-use in domains outside of *RDA*'s, where it may be useful in metadata applications for which it was never intended.

Application Profiles

As a best practice, registered vocabularies, content standards, and metadata schemas are specified in and documented by application profiles (APs). APs have found strong support from the Dublin Core community. Ultimately APs are about documenting standards, content, and usage. The point of creating and maintaining an AP is to promote reuse and interoperability. A practical example is the use of MARC relator terms in Dublin Core's library application profile. The Library of Congress reformulated and presented MARC relator terms such as editor, contributor, animator, and illustrator as a formal vocabulary with persistent identifiers and documented semantics. This list then was reused by Dublin Core and incorporated as relator terms which could be used in a Dublin Core AP. Voila, instant reuse of a vocabulary that is being continually maintained and developed.

Looking over AP examples, I was struck by the lack of detailed documentation. There is semantic information buried within APs, but transforming that into useful documentation for metadata creators remains a problem. Hillmann emphasized that APs are a rapidly developing area of metadata work, with no hard and fast rules ... yet.

RDA Interlude

During a discussion of Dublin Core, Diane Hillmann reprised her presentation at this year's American Library Association annual meeting in Washington, D.C. She reported on changes to the draft of *RDA* that make it more interoperable with Dublin Core.

There has been agreement to create registered *RDA* vocabularies, such as the earlier example of carrier vocabularies from the chapter 3 draft that was presented earlier. More ambitiously, a formal Dublin Core AP based upon *RDA* is planned. The hope is that this application profile, with its constituent vocabularies, will promote interoperable metadata in domains outside the traditional library world.

Conclusion

Given the current prevalence of digital library projects, this workshop was both timely and useful for many in the audience. On the other hand, much of the information that was presented may be of limited use for evaluating metadata projects in the more distant future.

Balancing specific best practice advice and how-to's with more generalized theory and models is a difficult undertaking. If anything, I felt that the workshop leaned more toward the current state of the metadata world, rather than providing specific guidelines on what to do. This was especially noticeable in the nature of the example applications and sites sprinkled throughout the workshop. Metadata is being created for digital libraries that range from thousands of objects to those of much more modest scope. How useful what we learned over two days in New Orleans will be in two years remains to be seen.

Program Report

Acquisitions Workshop

Reported by

Sue Burkhart

U.S. Court of Appeals 11th Circuit, Atlanta

The Acquisitions Workshop on Saturday started off with introductions by Lorna Tang from the University of Chicago. Carol Nicholson, University of North Carolina, was up first with an overview of what it means to be an acquisitions librarian, collection development librarian, technical services librarian, or some combination. She emphasized that the acquisitions librarian should be the one to delegate authority and duties for acquisitions work to others. This person should also be the one with whom faculty, firm partners, judges, etc. communicate. The acquisitions librarian should be the one to work out problems.

The theme of the day was DOCUMENT, DOCUMENT, DOCUMENT. In this "paperless society" you can keep your records in files on your computer or, if you still want to go with paper, you can keep them in the old fashioned file cabinet by your desk. Whatever way you keep your records, just keep them. The records should include who asked for what, correspondence with sales representatives, purchase orders, follow-ups, emails about returns or claims, tracking information for returns, etc. etc. You never know when you might need some tiny little piece of the paper trail when someone asks you a question.

Next on the agenda was Betty Roeske, librarian at the law firm of Katten Muchen, who provided a law firm acquisitions librarian perspective. She offered the wonderful idea of creating a generic email account where Internet updates, advertisements, etc. should be mailed by publishers and vendors, rather than having them mailed to a specific staff person who may leave the firm or be out for a while. This account also allows monitoring of emails and alerts that may be going to other people and determining if they are working. Betty also creates a serial record for every electronic product the library receives. This serial record is not for check-in, but for notes about license agreements, passwords, number of users allowed, when invoices are due, and any other information that staff may need.

Melody Lembke, Collection Management Services Director at Los Angeles County Law Library was next to speak. She was there to tell us all she knew about vendors and publishers! One of her points of interest was that 80% of a law library's material probably comes from the largest three publishers, and you probably have just as much trouble with invoices, customer service, etc. with these three as you do with all your other hundreds of publishers in your vendor database. EDI invoicing is certainly the wave of the future, and if all publishers can get with the program, then all of us should be willing to go that route to save time and be more efficient in our acquisitions process. Negotiating with publishers may be a bigger issue today than it has ever been in the past.

After lunch, Jim Mumm from Marquette University told us how to keep superb budgets and do wonderful reports and graphs for the higher-ups who control the purse strings. Jim's short and sweet explanation of budgeting: "You don't know where you're beginning, you don't know where you're going to end, and you don't know what you'll encounter along the way, but you must have a budget and strive for it to be balanced at all times." This is quite an undertaking for anyone. Jim also re-emphasized the five principles in the *AALL Guide to Fair Business Practices for Legal Publishers*.

Richard Vaughan from Indiana University told us all we ever needed to know about collection development and weeding.

Put everything in your collection development policy that you might need to refer to later, such as what to do about retaining those West annual publications. You may want to consider including something about gift donations in your collection development policy. Weeding, or de-selection, is the process of cancellation for things the library no longer needs. Weeding should be routine, and it should include considering whether to withdraw older editions.

TS-SIS has not offered this workshop since 1995, and it was wonderful. I think there have been some suggestions to have a workshop on a related topic, such as how to purchase those wonderful e-materials we all seem to be getting today, or helping library directors know what acquisitions or technical service librarians actually do. If these do come about, I hope that they are as good as this workshop was.

I learned a great deal, and I hope to be able to put into practice many of the ideas that these librarians had to impart to us. Thanks to each of them for putting on this great workshop.

Program Report

Casting A Wider Net: The Challenges and Rewards of Making Your Online Catalog a Useful Tool Beyond the Law Library

*Reported by
Linda Tesar
Vanderbilt University*

The moderator of this program was David Turkalo, Suffolk University Law Library

Can library staff utilize the resources of an online catalog to benefit other departments within a law school? “Casting a Wider Net” described the effort at Suffolk University Law Library to incorporate one law school department’s collection of books into the Law Library’s public catalog. Sarah Boling, Systems Services Librarian at Suffolk, and Sabrina Holley-Williams, Circulation Services Librarian, discussed the details of the project and their efforts to facilitate a positive and rewarding experience for their law school’s Career Development Office (CDO).

In the project’s early decision-making process, the library chose to maintain control of all cataloging and database issues. The CDO was given no access to create, edit or delete items at any time nor does it have access to the reports module. The only involvement CDO staff has in the library system is circulation-related. Key to the success of the project was determining what its staff needed to know and what needed to be referred back to the library.

To begin the project, library staff cataloged the collection of approximately 400 titles. Duplicates of Law Library titles were added to the library’s existing records; new records were loaded for unique titles. Systems staff installed the circulation module of Innovative’s Millennium and a barcode reader on a CDO machine. Circulation staff trained two members of the CDO staff, showing them basic circulation and outlining issues of patron confidentiality.

Successful implementation of the project required both the library and the CDO to make certain procedural adaptations. The Circulation Department reduced the number of logins by one to create a login for CDO staff. They also established new loan rules in Millennium to accommodate the different requirements of CDO materials and integrated CDO preferences regarding overdue notices into current procedures. The CDO also adapted its procedures. Since it makes its own purchases, participation in the library catalog requires it to send new books to the library for expedited cataloging and marking. Each book cataloged by the library receives a Library of Congress classification number. While CDO staff continue to divide the collection into internally-defined sections, items are shelved by LC call number within those sections.

Some interesting, but not insurmountable, issues arose during the project. An initial hurdle surfaced when the library staff discovered that the CDO was not on the same server sub-group as the library. Another issue involved repackaging terminology for a CDO staff not conversant in “library speak.” Circulation training had to be conducted twice as CDO staff forgot their initial training before they implemented the system. Perhaps the easiest problem to solve involved the barcode reader. CDO staff, completely unfamiliar with the operation of barcode readers, summoned the Systems staff when the barcode reader “malfunctioned.” Systems staff visited and obligingly re-plugged the barcode reader into the computer.

In the on-going relationship, the CDO is proactive about identifying issues and the systems librarian contacts CDO staff periodically to discover unresolved problems. There is also frequent communication between the CDO and the copy cataloger as well as contact between the Circulation Department and the CDO. Future plans call for including CDO staff in applicable Millennium training.

Both sides view the project as a great success. The CDO now has an accurate inventory of its collection which it has already

used to review and update its holdings. Its materials enjoy a greater exposure with their target audience and the staff has access to a variety of collection reports at any time. On the library side, the reference staff used information gained through the project to expand the description of the CDO in the library bulletin. The library also gained the benefit from a positive, proactive effort within the law school community while also providing the rest of us a blueprint for similar projects in our own institutions.

Program Report

Blogging and Beyond: New Communication Streams for Technical Services Librarians

*Reported by
Sharon L. Nelson
Northern Illinois University*

Presenter Bonnie Shucha of the University of Wisconsin Law Library did a great job providing an overview of what blogs are, how they work, and how they can be useful in our work as technical services librarians. She recommended that librarians read two types of blogs. Reading library and technical services blogs regularly helps us to stay on top of our jobs, and reading some of the blogs our patrons read helps us to stay abreast of their interests and potential needs. Law-related blogs are often called “blawgs” (pronounced the same as “blogs”) but the underlying principle of quick and informal communication remains the same. Like any other website, blogs are “buyer beware”—the quality of blogs will vary from fantastic to truly dreadful.

Bonnie’s detailed presentation handout (at <http://www.scribd.com/doc/138335/Blogging-and-Beyond-New-Communication-Streams-for-Tech-Services-Librarians>) lists a number of resources to locate high quality blogs in law, technical services, and librarianship in general. If you are interested, Bonnie’s own blog, WisBlawg, is at <http://www.law.wisc.edu/blogs/wisblawg>. She covers how blogs are organized, what “RSS” is, and how RSS allows you to subscribe to blogs so you can read all their posts in one place via a software program called a newsreader instead of having to view each blog individually. She also reviewed different types of newsreaders: some are web-based, some require you to download software on your PC; some are free, some are not. Some newsreaders also have the capability to view email as well as blog posts.

Bonnie demonstrated how to set up Bloglines, a free, web-based newsreader, so you can read your discussion list email in Bloglines instead of your email account. Conversely, should you not want to bother using a newsreader, but want to keep up with blog posts easily, you can use Feedblitz’s “subscribe to any blog by mail” feature to send blog posts directly to any email account. Bonnie also presented some other library-related applications of RSS technology beyond blogs. Libraries have set up RSS feeds to their “new books” listings to which patrons can subscribe like any other blog. Some publishers are setting up their new titles announcements as RSS feeds, and the Library of Congress is also making some of their weekly updated lists available as RSS feeds.

This was an especially useful program for anyone starting out to explore using blogs and subscribing to feeds, but even if you have been using these technologies for a while you may want to check out Bonnie’s handout. Even though I’ve been using RSS feeds and newsreaders for several years, I learned about some resources and features I hadn’t known of previously.

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