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INSIDE:

From the Officers

OBS-SIS..... 3

TS-SIS..... 4

Reports

AALL Keynote Address..... 31

Aggregator-Neutral Records.... 44

Cataloger's Desktop..... 33

Cataloging Video..... 34

CC:DA Report..... 12

Chapman Award..... 5

Classification Web..... 34

CONELL Report, Wakeford..... 1

CONELL Report, Garcia..... 26

CONELL Report, Given..... 27

CONELL Report, Sukhol..... 28

Digital Preservation Projects.... 36

Future of Print Periodicals..... 35

ILS Web 2.0..... 39

Joint Research Grant Report.... 23

Managing from the Middle,
Bloomstone..... 29

Managing from the Middle,
Wellman..... 30

MARBI Report..... 12

MarcEdit, Jenks..... 39

MarcEdit, Knight..... 41

Next-Gen ILS..... 42

NISO Training Session..... 23

OBS Business Meeting..... 9

OBS Record Sharing Annual... 22

OBS Record Sharing Meeting . 22

OCLC Update and Roundtable 21

OCLC's Record Transfer..... 48

Peer Collaboration..... 43

SAC Report..... 19

TOC Market Report..... 45

Trends in Library Automation.. 38

TS Acquisitions..... 23

TS Annual Survey Report..... 25

TS Business Meeting..... 7

TS Serials..... 25

TSSL Annual Report..... 6

CONELL Report

Leslie K. Wakeford
Professional Center Library
Wake Forest University

“Good morning!” I heard these cheerful words spoken countless times as I navigated through the Washington Convention Center with the help of friendly volunteers on my way to CONELL. I heard them again as the program began and speaker after speaker took the stage to cordially welcome the 2009 CONELL class. This was a promising start to a day of introductions, opportunities and networking.

As the fortunate recipient of the Marla Schwartz TS-SIS grant to attend CONELL, I was not a complete newcomer to the annual AALL meeting. I had travelled to Portland, Oregon in 2008 to participate in the Law Cataloging Workshop and attend one day of the meeting. Looking back to compare my experiences with and without the benefit of CONELL, I know the real value that such a well-planned program holds for a newer member of AALL. CONELL primed me for the conference to come, not just socially by providing a host of familiar faces to greet in the days ahead, but also mentally as I developed a roadmap to the organization and learned about opportunities to get involved and organize my conference activities to best advantage.

Opportunity was a word we CONELL attendees heard frequently during the morning session: opportunities to publish, to mentor, to volunteer, to submit proposals. While not unfamiliar concepts, getting involved with these endeavors changes with the environment and it was illuminating to hear from editors, committee chairs and executive board members about how to do it right in AALL. Encouragement abounded as we were told that the *nugget of an idea* was the right place to start developing articles and program ideas, which could be fleshed out in conversation. It was helpful to hear about specific conference sessions and meetings in days ahead where we could learn more about professional writing and brainstorming program ideas. When Ellen Platt, Mentoring Committee chair, exclaimed during her comments about conference social events, “If you plan your conference schedule right, you can eat for free!” everyone laughed and I understood that I was in a room of like-minded professionals who wanted the *newbies* to get involved and truly enjoy their first AALL meeting.

Continued on page 49

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

TSLL Staff

Editor-in-Chief:

Virginia Bryant
George Washington University

Associate Editor:

Cindy May
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Layout & Design:

Julie R. Stauffer
University of Chicago

Web Manager:

Martin E. Wisneski
Washburn University

Contributing Editors:

Acquisitions:

Trina Robinson

Classification:

Marie Whited

Collection Development:

Courtney Selby

Description & Entry:

Robert Bratton

The Internet:

vacant

Management:

Karen Douglas

MARC Remarks:

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OCLC:

Ming Lu

Preservation:

Sally Wambold

Private Law Libraries:

Beth Holmes

Research and Publications:

Hollie White

Serial Issues:

Richard Paone

Serial Titles:

Barbara Bohl

Subject Headings:

Aaron Kuperman

TechScans:

Corinne Jacox & contributing authors

Editorial Board SIS Representatives

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Online Bibliographic Services Special Interest Section

Hello everyone. This is my first column as OBS-SIS chair and I want to thank you for your confidence in electing me. I've been a member for a few years and find OBS becoming more important and informative as my duties change and our libraries evolve. I have a lot to learn, but good examples to follow. I first became interested in OBS a couple of years ago when I realized that many technical services positions were also becoming systems positions, whether officially or unofficially. Although I still love the traditional technical services responsibilities of cataloging and classification, I find myself moving more and more towards using that traditionally-supplied information in new ways. It's no longer enough to get the information into our catalogs, now we have to get it out of our catalogs and manipulate it differently from how we have done it before. Google and Amazon have changed the future of information retrieval and we need to work with that idea as we move into a new future of online bibliographic services. It's an exciting time to be in libraries, even if the future is uncertain, maybe even intimidating.

I'd like to thank our outgoing officers for all their work, much of it unseen, but always appreciated. Thanks to: Andrea Rabbia, Past Chair; Mary Strouse, Secretary/Treasurer; and Susan Karpuk, Member-at-Large. Also please welcome the new Executive Board members: Kathy Faust, Vice Chair/Chair-Elect; Karen Selden, Secretary/Treasurer; and Keiko Okuhara, Member-at-Large. Michael Maben, Immediate Past Chair; and Elaine Bradshaw, Member-at-Large are continuing on the Executive Board for 2009/2010. New committee chairs will be announced soon. Some positions are already filled and I thank Ellen McGrath, *TSLL* representative, and Hollie White, OBS/TS Joint Research Grant Committee chair for agreeing to serve. I personally want to thank Michael Maben for all his guidance this year. I hadn't expected to become Chair quite so soon—I was thinking member-at-large would be a good way to start in OBS. But when the Nominating Committee called, I couldn't say no. When I was elected, I started wondering what I'd gotten myself into. But Michael was always willing to answer questions, reassure me of the schedule and set me straight on deadlines and responsibilities. He only thinks he's done now. I will continue to rely on him and all the Board members this year. However, to quote many an author, "Any mistakes are solely mine."

This is the conference issue of *TSLL*, so those of you who couldn't make it to the Annual Meeting can see what happened and find new ideas and information. Remember AALL2Go if you want to hear the programs yourself. I encourage that since no summation, however thorough, could possibly include everything. I've used the AALL recordings to hear twice the number of programs that I could have attended. It's the next best thing to being there. I love the energy the annual conference generates—there's always something new and exciting to take back to work, updated or reworked ideas to invigorate me. I always come away from the Annual Meeting feeling excited about librarianship again, remembering what it was that attracted me in the first place. I remember wanting to help people find what they needed and wanted, and how gratifying it was to help them find their answers. Now I work less directly with users, but it's still exciting to solve their problems and get them the information they need, even if it's through a systems fix and not face to face. I want to hold on to that feeling. I know many of you feel the same and I will count on that this year.

As chair of the Education Committee for the 2010 Annual Meeting, I have seen firsthand the efforts and expertise of our members and the exciting, informative programs they are putting together. Last year we had more programs than we could present and this year will be the same. I wish we could present all of them. Now is a good time to be a member of OBS with so many computing and systems changes in the air—open source systems, cloud computing, new metadata mining projects—there's so much to learn and look forward to. By the time you read this, the Education Committee will have submitted the program proposals to AALL. The Annual Meeting Program Committee will notify us of the programs they have selected sometime in October and then the Education Committee goes back to work to be sure all the speakers are informed, the handouts prepared and the equipment ordered.

As a volunteer organization, all our committee and board work is done in the time squeezed out of our free time. The committees put in many hours each year to make our SIS work, and they make it look so easy. Bills are paid, programs presented, receptions are planned. And our members come and are rewarded. This year I'd like to make two requests of every one of you. The first one is: please volunteer your time and help your fellow members continue the fine tradition of OBS. Share your knowledge, enthusiasm and time with all of us to take this SIS into the next decade of the 21st century. If you are asked to serve on a committee, please say yes. We need all of you. If you are asked to run for a board position,

please consider doing so. It's remarkably flattering to even be considered and if you are elected, you will find it rewarding. Secondly, find a new member and make him/her your protégé for this year. Talk to them about the Annual Meeting and all the opportunities it offers. Show them copies of *TSLL* and all it contains. Help them find resources such as the joint OBS-TS research grants, or scholarships and grants for the Annual Meeting. Encourage them to volunteer or even run for office. If you don't know any new members, make one. Talk to your coworkers and fellow members in local chapters and organizations. Tell them what we have to offer and, most of all, tell them that we want them to join us. I look forward to working with all of you this year.

*Pat Sayre McCoy
D'Angelo Law Library
University of Chicago*

From the Chair

T

Technical Services Special Interest Section

For some reason, time is on my mind as I begin to write this column. Maybe it is because I always feel that I do not have enough of it—I am sure you can relate. But probably it is because the period just after the Annual Meeting is always a time of transition, wrapping up the past and preparing for the future. I guess that is what the chair's first column always comes down to.

First, let's take a quick look back. I know that many of you were not able to make it to Washington, D.C. in July. Maybe this was the first time in many a year that you were not able to attend the Annual Meeting. Believe me when I say that your presence was missed. But despite our somewhat diminished numbers, we were still mighty in spirit. As is always the case with TS-SIS, the programming was excellent. Hats off to last year's Education Committee, chaired by Karen Douglas, and to the many coordinators, speakers, and moderators who made it happen. Kudos also to the committee chairs and facilitators who organized the meetings and roundtables that also are so valuable to our professional development. Congratulations as well to Carmen Brigandi for arranging a very successful Joint Reception, generously sponsored by Innovative Interfaces. The food was delicious and plentiful and the conversation was just as satisfying.

One of the key components of the TS-SIS business meeting is the presentation of the Renee D. Chapman Memorial Award for Outstanding Contributions in Technical Services Law Librarianship. I believe this year's recipient, Curt Conklin from Brigham Young University, set a record that may never be surpassed—farthest distance traveled to accept the award. Curt came all the way from Australia where he now makes his home to receive the award presented to him by his former colleague Galen L. Fletcher. Congratulations to Curt as he joins the illustrious list of Chapman Award recipients.

As I finish looking back, I would be remiss if I did not thank our outgoing officers for their outstanding service to TS-SIS: Carmen Brigandi as Member-at-Large, Karen Nuckolls as Cataloging & Classification Committee chair, Carol Avery Nicholson as Serials Committee chair, and Alan Keely as Immediate Past Chair and Bylaws Committee chair. Alan did yeoman's work in bringing the TS-SIS bylaws into conformance with the AALL Model Bylaws for SIS's and his proposed amendments were passed at the annual TS-SIS business meeting. And a special word of thanks to last year's TS-SIS chair, Linda Tesar, who made my "ramping up" year fun and who very patiently answered all my questions. Trust me, I will have more.

Now let's take a quick peek at what is ahead. The 2010 Education Committee has been hard at work for several months. The chair, Carol Avery Nicholson, is shepherding the group and at the time this column is being written the committee has one workshop proposal and about fifteen program proposals that are being evaluated for submission to the Annual Meeting Program Committee. Although AALL and TS-SIS will not be able to support all of these programs next year, I think it is safe to say that we will offer both quality and quantity in the way of programming in Denver. Future columns will have more information as the year unfolds.

Something to look for in the fall is the volunteer form. The form will be available to you on the TS-SIS website throughout the year, so whenever you get a spark of ambition you can choose which activities you would like to become involved in.

An SIS this large and energetic needs a lot of people to be involved in order to get done what we want to accomplish, so to adapt a phrase from Chicago elections, volunteer early and often!

I look forward to working with the new and returning board members, committee chairs, and representatives: Linda Tesar, Immediate Past Chair; Pam Deemer, Vice Chair/Chair-Elect; Wendy Moore, Secretary/Treasurer; Betty Roeske and Katrina Piechnik, Members-at-Large; Ajaye Bloomstone, Acquisitions Committee chair; George Prager, Cataloging and Classification Committee chair and representative to the ALA MARBI Committee; Marilyn Estes, Preservation Committee chair; Shyama Agrawal, Serials Committee chair; Karen Nuckolls, Ad Hoc Committee on Professional Development chair; Wendell Johnting, Awards Committee chair; Hollie White, Joint Research Grant Committee chair; Barbara Henigman and Patricia Satzer, Joint Research Grant Committee representatives; Sean Chen, Membership Committee chair; Elizabeth Geesey Holmes, Nominating Committee chair; John Hostage, ALA CC:DA representative; Yael Mandelstam, ALA SAC representative; Gwen Gregory and James Mumm, TS-SIS representatives on the *TSL*L Board; Martin Wisneski, Web Site Manager; and Alan Keely and Smita Parkhe, Discussion Forum Managers.

As I prepare to hit the Save button on this column, I now have been chair of TS-SIS for approximately 23 days, 19 hours, and 45 minutes—but who’s counting? I have learned a lot in that short amount of time—primarily that I have much more to learn! Thanks for the privilege of allowing me to serve you as chair of TS-SIS.

Chris Long
Indiana University School of Law-Indianapolis

Chapman Award Presented to Curt Conklin

Galen L. Fletcher

Editor’s note: At the presentation of the Chapman Award, Galen Fletcher summarized some of the outstanding professional accomplishments of his colleague, Curt Conklin. In lieu of these remarks Galen requested TSL print the complete description of Curt’s achievements as noted in his nomination letter to the Awards Committee.

When TS-SIS and OBS-SIS wanted to post all the back issues of *Technical Services Law Librarian* online (plus *The Law Cataloger*) a few years ago, it was Curt Conklin’s own carefully preserved and full run of issues that was used. He had them all, the very first issues on to the present ones, and was pleased to share them with his *TSL*L colleagues. This behind-the-scenes support of technical services law librarianship typifies Curt Conklin’s long service to the profession and his institution.

When the BYU Law Library opened its doors for the first time in fall 1973, Curt Conklin had already been working in its technical services department for over a year. Since the KF schedule for law was brand-new also, the library collection started with LC classification (instead of requiring a re-organization from a prior system). Curt Conklin soon developed a cross-reference guide for LC subject headings and KF call numbers, published it in 1979, and sold copies to over 100 libraries. (OCLC currently shows 84 libraries having copies of this law cataloging tool 30 years later.) He was the principal contributor to a foreign law classification schedule in 1975 which was used by many law libraries prior to the finalization of the LC foreign schedules twenty years later. He even compiled and published a guide for authority control purposes of *Library of Congress Entries for State and Local Bar Associations*. Mr. Conklin helped many colleagues beginning to adapt to the LC classification system during the late 1970s and 1980s.

Curt Conklin’s service to the profession continued with the transition to AACR2 and automation. He attended AALL’s first large Cataloging Institute in 1980. Prior to that, he was an avid participant in the AALL Cataloging and Classification Committee 1975-1979 and a founding member of the Technical Services Special Interest Section in 1978.

The BYU Law Library moved into automation early, with its campus move to BALLOTS (the predecessor to RLIN) in 1979, and then an online serials management system in 1980 (separate from any utility or catalog). Curt oversaw his law library’s transition from paper to electronic systems from 1980 to 1984, and was instrumental in helping other U.S. technical services law librarians when they went through retrospective conversion during the following decade. In these pioneering areas, Curt Conklin helped his library and those of many others. He was a believer and advocate for library standards, and constantly worked to maintain and improve his own work so that it would be useful to others. This care continued in the shared cataloging environment of the bibliographic utilities.

Curt Conklin believed in the importance of AALL and TS-SIS. “Professional meetings are where you go to stay current in the profession, and see if you are following the general pattern of your peers,” he told me when I was a new cataloger.

Despite his life-long hearing handicap, he persisted in going to as many AALL annual conferences and training workshops as possible.

Committee work in the early days was challenging for Mr. Conklin, since it required a lot of telephone work and he had to rely on lip-reading to understand what people were saying. Still, Curt served in as many capacities as he was able. For example, he was the Chair of the TS-SIS Cataloging & Classification Committee in 1980-1981, at a time when it was the only TS-SIS committee and 40 other individuals wanted to be on the same committee. He chaired and contributed his expertise to many ad-hoc committees and working groups over the years. He was the OBS-SIS co-representative on the *Technical Services Law Librarian* Editorial Board in 1991-1993, and after long service as a member of the TS-SIS Preservation Committee, he was also its Chair in the 1990s. He used humor and good sense in his committee work, and many times represented the views of technical services law librarians from smaller institutions.

He shared what he learned in various presentations, with his AALL programs spanning twenty years. He shared his Australian law library exchange experiences, talked about disaster planning and preservation, and narrated the TS-SIS skit at the AALL Centennial Conference "I Never Metadata I Didn't Like." He gave many local informal presentations on such topics as "Langdell and Socrates: A Rigorous Legal Education" (1981), "The ABC's and Higher Math of Law Librarianship" (1991), and "What Law Students Need To Know About Cataloging and Classification" (2006-2009).

The advent of email in the early 1990s coincided with a marked decrease in Curt's ability to hear (even with his hearing aids). He pulled back from committee work, seeing his disability as getting in the way of productive deliberations and solutions. Virtually deaf, he found ways to give back to others via email lists and online discussions.

He was the lead compiler of *An Historical and Bibliographic Introduction to the United States Statutes at Large* in 1992, which grew out of his twin loves of cataloging and history. An outgrowth of that project was his *Law Library Journal* article in 1996 on the "phantom" Thirteenth Amendment to the U.S. Constitution. When Jolande Goldberg was creating the foreign law classification schedules in the 1990s, Curt was consulted for his views (based on his prior work in this area). He deferred to Ms. Goldberg's legal training and expertise, saying he did not want to be telling the Library of Congress how to do their job.

Curt helped TS-SIS with his institutional memory, and was a mentor to others. My first (and second) law library professional positions as a Technical Services Librarian were a direct result of his networking and support. His ability to defuse conflicts with well-timed humor, his thoughtful analysis and contributions to issues (from Z39 serial standards to inherently legal subject headings), and his many decades of work spanning the entire history of TS-SIS, make him a worthy candidate for this year's Chapman Award.

Curt Conklin is one of the dwindling few current members of TS-SIS who was also a founding member of this special interest section, a member of the AALL Cataloging and Classification Committee, and who knew and worked with Ms. Renee Chapman. He would be very honored to receive this award named for her. And, TS-SIS would be aided by honoring Mr. Conklin for his pioneering contributions to technical services law librarianship for almost forty years.

TSLL Annual Report Covering July 2008-July 2009

There were four issues published in volume 34, and these issues are available on the *TSLL* website in PDF format. With the completion of the conference issue (Sept. 2008) edited by Brian Striman, Virginia Bryant assumed the position of editor-in-chief for *TSLL*, with Cindy May continuing as associate editor, Julie Stauffer continuing her layout and design responsibilities, and Martin Wisneski as web manager. Ably assisted by this dedicated staff, the new editor's immediate goal to return the publication of *TSLL* to a regular publication schedule was achieved.

After twelve years compiling the serials titles changes, Chris Tarr and Maggie McDonald ended their run with the December 2008 issue, but the column didn't miss a beat, with Barbara Bohl stepping forward to continue their work. One of the editor's primary goals this year was to fill the vacant columns. Some of the new columnists were set to begin writing for volume 34, while others when asked graciously agreed to author a column. Acquisitions (last written in June 2007 by Kevin Butterfield) was filled by Trina Robinson, Collection Development (last written by Margie Maes in June 2008) was filled by Courtney Selby, Description and Entry (last written in March 2006 by George Prager) was filled by Robert Bratton, Management (last written by Caitlin Robinson in March 2008) was filled by Karen Douglas, Private Law Libraries (last written in March 2008 by Donna Rosinski-Kauz) was filled by Beth Geesey Holmes, and Research and Publications (last written by Chris Long in

June 2006) was filled by Hollie White. Just when the editor thought the columns were set, new opportunities emerged. Well regarded Internet columnist, Kevin Butterfield, accepted a position at the University of Richmond's main library. Several more replacement authors also will be needed as Monica Kauppi steps down as classification coeditor, and Ellen McGrath, a major contributor to the TechScans column, leaves big shoes to fill. All of these columnists mentioned, as well as those faithful continuing columnists, deserve our thanks and applause for their outstanding work on *TSLL*.

In addition to the regular columns, volume 34 also offered several special articles about current practices in law libraries, including topics on improving the catalog and changing series authority control practices. The editor would like to encourage more librarians to write short articles about ways they have dealt with current issues in their libraries as a means of sharing that information with their colleagues.

A late development this year is a proposal from Hein to include *TSLL* in a special library within HeinOnline that Hein seeks to develop for acquisitions, cataloging, and other academic technical services librarians. Both TS-SIS and OBS-SIS boards and AALL will consider Hein's proposal, which would make past and current content in *TSLL* more accessible.

*Submitted by
Virginia Bryant
TSLL Editor-in-Chief
Chair, TSLL Editorial Board*

**Technical Services Special Interest Section
2009 Annual Business Meeting
Sunday, July 26, 2009
Renaissance Hotel – Ballroom East, Washington, D.C.**

MINUTES

Call to Order and Verification of a Quorum

Chair Linda Tesar called the meeting to order at 5:35 p.m. Secretary/Treasurer Wendy Moore verified that we had a quorum of members present in order to conduct the meeting. There were 53 members present. The Annual Business Meeting quorum requirement is 30 members.

Introduction and Welcome of TS-SIS VIP

Gabriel Horchler was introduced as the TS-SIS 2009 Annual Meeting VIP. Horchler is the Head of the Law Section of the U.S. and Publisher Liaison Division of the Acquisitions and Bibliographic Services Directorate of Library Services at the Library of Congress, which is the section that does 90% of the law cataloging for the Law Library of Congress.

Approval of minutes of the Annual Business Meeting from July 14, 2008, Portland, OR

Pam Deemer made a motion that the minutes from the July 14, 2008 Annual Business Meeting in Portland, Oregon, be approved. The motion was seconded. The minutes were approved with a voice vote with no objections.

Secretary/Treasurer Report – Wendy Moore

Secretary/Treasurer Wendy Moore reported that as of May 31, 2009 TS-SIS had a balance of \$17,254.78. She noted that TS-SIS will probably close this year with a smaller balance than we began it with, due to Executive Board decisions to spend more of our funds on the membership during difficult economic times, including more funds for scholarships and more funds for breakfasts at early morning committee/roundtable meetings. The TS-SIS Elections held this spring saw a 30% participation rate among our members.

Standing Committee Chairs Reports

Acquisitions Standing Committee Report – Ajaye Bloomstone – Bloomstone announced that the Acquisitions Standing Committee Meeting/Roundtable will be held Monday, July 27, 7:00-8:30 a.m. She also noted that the TS-SIS Program on “Redefining Work Roles in Response to Changing Collection Environments” at 2:30 p.m. on Tuesday, July 28, will be combined with the TS-SIS Technical Services Management Issues Roundtable following it at 3:15 p.m.

Cataloging and Classification Standing Committee Report – Karen Nuckolls – Nuckolls reported that the discussion mainly focused on RDA issues at the Cataloging and Classification Roundtable held earlier on Sunday, July 26, from 3:00-4:00 p.m. She noted that the Cataloging and Classification Standing Committee Meeting would be held Monday, July 27, from 9:00-10:30 a.m.

Preservation Standing Committee Report – no report given

Serials Standing Committee Report – Carol Avery Nicholson – Nicholson reported that Serials Standing Committee has been focusing on Project COUNTER statistics. She also noted that the Exchange of Duplicates Program has been running with 36 libraries participating. She mentioned that the “Managing from the Middle” Workshop held on Saturday, July 25 and program A-6 “Here Today, Gone Tomorrow? The Future of Print Periodicals in Law Libraries” held on Sunday, July 26 both featured Serials Standing Committee members and were successful and well attended. She noted that the Serials Standing Committee Meeting will be held Tuesday, July 28 from 7:30-8:45 a.m.

New Business

Bylaws Changes – Alan Keely – Keely reported that the proposed bylaws changes had been sent out to the membership on May 27 with follow-up listserv discussion. The changes to the bylaws were undertaken to align the TS-SIS bylaws with the AALL model bylaws for SISs. Rhonda Lawrence made a motion to adopt the proposed changes to the bylaws in their entirety. The motion was seconded. The motion passed with a voice vote with no objections.

Awards – Linda Sobey

Marla Schwartz Grant recipient Leslie Wakeford was recognized. She used the grant to attend CONELL.

TS-SIS Educational Grants recipients were recognized. These grants were used in support of AALL Registration, Workshop Registration, and CONELL Registration. The recipients were: Ajaye Bloomstone, Iris Garcia, Lindsay Beth Given, Emily Phillips, Victoria Sukhol, Richard Todd, and Jared Wellman.

Renee D. Chapman Memorial Award was presented to Curt E. Conklin. Galen Fletcher reviewed Conklin’s career in Technical Services at Brigham Young University and his significant contributions to the profession, library automation, and cataloging tools. Conklin accepted the award in honor of Renee Chapman.

TSLL Report – Virginia Bryant

Virginia Bryant reported that Vol. 34 of *TSLL* had four issues produced and met the goal of getting the issues out on time. She also noted that there are a couple of column vacancies that need to be filled. She announced that Hein proposed to *TSLL* Board a plan to put *TSLL* on HeinOnline and that AALL is working with Hein about the possibility.

Chair’s Report – Linda Tesar

Linda Tesar reported on TS-SIS table presence at CONELL Marketplace and the Exhibit Hall. She noted that the NISO training slides will be posted on AALLnet and there will be links to them from the TS-SIS webpage. She thanked members of the TS Executive Board, chairs and members of committees & task forces for their contributions to TS-SIS during this past year.

Old Business

There was no old business discussed.

New Business (continued from earlier)

There was no additional new business discussed.

Passing of the gavel

Linda Tesar introduced Chris Long as the new TS-SIS Chair and presented him with the TS-SIS meeting gavel.

Chris Long presented Linda Tesar with a plaque in recognition of her service as Chair and thanked her for her contributions to TS-SIS.

Comments from the New Chair

Chris Long spoke about how important the membership is in keeping the work of TS-SIS going. He recognized the incoming Vice Chair/Chair-Elect Pam Deemer and the new Member-at-Large Katrina Piechnik.

Meeting adjourned at 6:08 p.m.

*Respectfully submitted,
Wendy Moore
Secretary/Treasurer*

**Online Bibliographic Services Special Interest Section
2009 Annual Business Meeting
Monday, July 27, 2009
Washington, D.C.**

MINUTES

Chair Michael Maben called the business meeting to order at 5:35 PM. Following the Chair's welcome, the minutes of the 2008 business meeting were approved as published in *TSLL* v. 34, No. 1 (September 2008 as corrected).

Officer's Reports

Outgoing Secretary-Treasurer Mary Strouse gave the elections and treasurer's report. An online election was held throughout the month of April. 102 votes were cast out of a possible 317. The following officers were elected for the 2009-2011 term:

Vice Chair/Chair-Elect — Kathy Faust, Lewis & Clark College
Secretary-Treasurer — Karen Selden, University of Colorado
Member-at-Large — Keiko Okuhara, University of Hawaii

As of May 30, 2009, the balance of the OBS account stood at \$7,781.47. However, this figure includes a pre-payment from Innovative Interfaces, Inc. towards 2009 Joint Reception expenses and does not reflect vendor reimbursements for 2008 annual meeting activities which are still outstanding but expected shortly. Additional non-reimbursable expenses for the current annual meeting are estimated at \$975.

Incoming Chair Patricia Sayre McCoy gave the Vice Chair's report. This year the member survey was conducted online. Because no due date was specified during setup, the survey never closed and responses have continued to come in. As of the Annual Meeting, 108 responses were received. A broad theme in the comments was how much the members like and appreciate *TSLL*. It has been noticed that *TSLL* is now timely. At least one respondent, however, still pines for the printed edition. Members also requested more up-to-date information about OBS Board activities, and the incoming Board will consider ways to fill that need. Possible means include blogging, twitter and the existing OBS facebook page.

Member-at-Large Elaine Bradshaw (2008-2010) reported on the Joint Reception, which took place on Saturday evening at the Renaissance Hotel and was well attended. Because of higher-than-normal catering expenses this year, each of the four sponsoring SISs was asked to contribute an additional \$675 of their own funds toward the Joint Reception.

Member-at-Large Susan Karpuk (2007-2009) reported on the OBS activities table. Because of the compressed conference schedule, it is increasingly difficult to get volunteers to sit at activities tables. However, the effort is worthwhile because staffed tables attract significantly more attention. Candy and the paperback book exchange also attract people to the OBS table. Members (particularly those local to a meeting) should be encouraged to bring in more books.

Again this year, a drawing for a \$25 gift card from Amazon.com will be held at the OBS table on Tuesday afternoon just before the exhibit hall closes. The winner of the drawing will be notified by email and the card will be sent directly from Amazon. A new sign will be needed if the gift card drawing is continued next year.

Committee Reports

Susan Goldner reported as chair of the Nominating Committee. Other members were Pat Callahan and Janet Hedin. Six nominees were found for the three positions. The Committee particularly wants to thank those who ran but were not successful, and to encourage each of them to consider participating in future elections. There is a history of repeat candidates being chosen in subsequent elections.

Mike Maben reported on Education Committee activities leading up to the 2009 Annual Meeting. The committee began its work in June 2008 and put forward six proposals to AMPC. Three programs were accepted:

- B-6:** "MarcEdit: A Magic Wand For MARC Records"
- C-3:** "Latest Trends in Library Automation: Building Creative and Inspiring Discovery Platforms"
- F-6:** "Taking the Aggravation Out of Aggregators: An Update on Aggregator-Neutral Bibliographic Records"

An additional three programs were self-sponsored by OBS. These include a roundtable with Terry Reese following his MarcEdit presentation, the post-conference Catalogers' Desktop/Classweb training sessions at Library of Congress, and "The TOC Market Report: Undervalued TOCs Yield Huge Dividends" presentation and roundtable on Tuesday.

Pat Sayre McCoy reported on Education Committee activities since June first of this year. The committee will meet the following morning at 7:00 AM. The deadline for final submission of proposals for the 2010 Annual Meeting is August 23rd. Potential topics for programs so far include open-source ILS systems, quality control in catalogs, ILS management, OCLC projects in networking and cloud computing, and a program on hiring new catalogers.

Mike Maben gave the Local Systems Committee report on behalf of Caitlin Robinson. The committee will hold local systems roundtables on Tuesday. No vendor showcase was scheduled this year.

Keiko Okuhara gave the OCLC Committee report. This year the committee again sponsored an "OCLC Update" led by OCLC's Glenn Patton followed by a roundtable discussion. Turnout was good, with approximately 30 people for the update and fifteen remaining for the roundtable. Topics covered in the OCLC update included:

- Revised OCLC Record Use Policy
- New OCLC report titled *Online Catalogs: What Users and Librarians Want*
- New OCLC initiative "web-scale" Library Management Services
- WorldCat Local
- Expert Community Experiment – there has been positive feedback from both OCLC and members, and the experiment is expected to continue past its initial end date.
- xISSN Web Service

While the OCLC update is always informative, the committee is concerned that the annual presentations might run too long. Scheduling the update and the roundtable back-to-back makes for a 150 minute marathon.

The OCLC Committee's other major activity this year concerned the revised OCLC record use policy. The committee distributed information about the new policy via the OBS-sponsored OCLC listserv, solicited comments from members and shared the comments with OCLC. In addition, a resolution against implementation of the new policy was drafted by Mike Maben. The AALL Executive Board approved the resolution and submitted it to OCLC. A program on the record use policy was organized for the TS-SIS hot topic slot this year.

Mike Maben gave the Web Advisory Committee report. Tim Knight has agreed to take over as OBS Webmaster. Kevin Butterfield resigned that position after accepting a position outside of law libraries. An initiative is already afoot to clean up the existing website in advance of an expected overhaul of AALL's web presence this fall.

Pat Callahan gave the report of the Special Committee on Record Sharing. The committee drafted a Statement of Guidelines for Record Sharing which it submitted to the OBS Board in the spring. The Statement was approved by the OBS Board at its meeting on Saturday, July 25, 2009. The statement will now be submitted to the AALL Executive Board for approval. Following that step, it can be distributed to vendors and other interested parties. Assuming successful adoption of the statement by AALL, the Special Committee may no longer be necessary.

The Special Committee's other major activity this year was contributing feedback to the draft resolution on the revised OCLC record sharing policy and helping to develop the TS-SIS hot topic program on the revised policy. Now that OCLC has withdrawn its flawed policy and appointed a group to develop its replacement, the Special Committee urges that some mechanism be found to gain AALL access and representation to the group charged with developing a replacement policy.

Chris Long gave the report of the Joint Research Committee. Again this year no grant applications were received. The committee has discussed strategies for encouraging applications, including a suggestion to alter the eligibility requirements so that student members may apply. Suggestions will be passed on to the incoming committee. If these actions do not spark more applications, the committee may propose dismantling the grant program or recasting it as a source of travel grants.

TSLL Report

Editor Virginia Bryant gave the *TSLL* Annual Report for 2008-2009, a copy of which appears on the *TSLL* webpage. Timely publication has been the primary goal of the new editorial team. The most recent two issues came out on schedule. Virginia especially thanked *TSLL* staff Cindy May, Julie Stauffer and Martin Wisneski for their support.

There have been various transitions among column editors. In particular, Virginia thanked Chris Tarr and Maggie McDonald for their longstanding piloting of the serials title changes column and Ellen McGrath for organizing the TechScans rss feed and keeping it going. All three are stepping down to pursue other projects. Kevin Butterfield's departure creates a vacancy on the Internet column. Virginia is also hoping to encourage more special articles on current topics, and has already published several of these.

The *TSLL* Board received a proposal from Hein to include *TSLL* in a special online library of technical services resources. There are a number of questions to be resolved by AALL including copyright assignment. Preliminary discussions indicate members favor online access to *TSLL*.

Chair's Remarks

Outgoing Chair Mike Maben described the year that was, beginning with an email survey of members last fall on the question of continuing the Joint Reception. By and large, those who responded supported continuation. Rising costs may force reconsideration in future. There is pressure to cut back on social events.

There was much activity connected to the OCLC record use policy fiasco. The new policy was developed without member input and sprung on the Members Council at the very end of that body's November meeting. The record use policy was a hot issue at the ALA midwinter meeting, and the subject of an ARL report. Following petitions and discussions in various forums, AALL President James Duggan invited Mike to take the lead on drafting a resolution on behalf of the Association.

Mike sought comment from the OBS and TS Boards and from George Prager, Phyllis Post and Pat Callahan. His draft resolution in opposition to the policy was approved by the AALL Executive Board in April and forwarded to OCLC. Jennifer Younger, the Chair of the OCLC Review Board set up to hear objections to the record use policy, cited AALL's resolution in her presentation of the Review Board's report. On the recommendation of the Review Board, the record use policy was recently withdrawn and will be rewritten, this time with member input. In the meantime, OCLC's 1987 guidelines on record sharing remain in effect.

Chris Long rose to commend Mike for his leadership on this issue and for the elegance of his draft resolution. The meeting joined Chris in a round of applause.

Mike also moderated today's TS-SIS hot topic program on working with the OCLC record use policy. Speakers were Roberta Shaffer from Library of Congress, a member of the OCLC Review Board, and Pat Callahan, chair of the OBS Special Committee on Record Sharing.

This year OBS sponsored Bruce Johnson of Library of Congress as an Annual Meeting VIP. Mr. Johnson helped to organize the Cataloger's Desktop and ClassWeb training sessions to be held at LC on Wednesday. Mr. Johnson will attend conference programs and sessions on Monday and Tuesday.

In other OCLC news, Phyllis Post has resigned as AALL Observer to the OCLC Members Council a year before the end of her three-year term. Phyllis had accepted the appointment because of her proximity to Dublin, Ohio where the Members Council met. At the close of its most recent meeting, the US-based Members Council was disbanded in favor of a new worldwide governance structure. It is not yet clear what the replacement structure will be. There is talk of a US regional council which will meet in connection with meetings of ALA. Phyllis did not feel she could make the commitment to travel to one or more meeting a year. As the new governance structure is clarified, AALL and the OBS Board will consider how best to represent their members interests with OCLC.

In sum, Mike reported an exciting year as Chair of OBS and expressed his thanks to the membership for the confidence they placed in him. With that, Mike passed the OBS leadership cap to incoming Chair Pat Sayre McCoy. Pat also thanked both the Nominating Committee and the membership for their vote of confidence and presented Mike with a token of appreciation for his leadership in the form of a gift certificate to dugout-memories.com, a source for "everything baseball".

In her concluding remarks, Pat Sayre McCoy referred to the ongoing process of appointing new committee chairs. She has several individuals to contact but welcomes additional suggestions. A major goal for the coming year will be to update and refresh the design of the OBS website. The recently-announced redesign of AALL.net and its shift to a new platform may dovetail with the OBS effort. However, it is not clear how long and/or complicated the AALLnet redesign will be.

There being no further new business, Pat adjourned the meeting at 6:25 PM.

*Respectfully submitted,
Mary M. Strouse
August 24, 2009
[corrected 8/26/09 MMS]*

**Report of the AALL Representative to the American Library Association,
Association for Library Collections and Technical Services,
Cataloging and Classification Section: Description and Access (CC:DA)
ALA Midwinter Meeting, Denver, Colorado, January 2009
ALA Annual Conference, Chicago, Illinois, July 2009**

*John Hostage
Harvard Law School Library*

The work of CC:DA has been focused to a large part on the development of *Resource Description and Access*, otherwise known as *RDA*. This new cataloging code, a successor to *AACR2*, has now completed its editorial phase. A complete draft consisting of hundreds of pages in multiple PDF files was released for review in November 2008. There was much criticism of the fact that the online product for which *RDA* has ostensibly been designed was not available for review. A demo version of the product was promised for February, but has still not appeared as of this date. At the annual conference in July it was reported that the developer was directed to work on the actual database instead. The Joint Steering Committee for Development of *RDA* (JSC) discussed comments on the draft at its March meeting and delivered the final text to the publishers in June. The release date for the online product is now projected for late November. The planned testing period by the three U.S. national libraries and a group of other libraries won't begin until after that. The testing will take place over six months and then be evaluated by the national libraries, so there won't be a decision on implementation until late 2010.

Since not all issues were resolved for this initial release of *RDA*, attention will soon turn to proposals for revisions. There are still some issues that law catalogers are not satisfied with, such as entry for treaties, entry for court reports, and uniform titles for laws and treaties.

I will be reporting to the Technical Services Special Interest Section and to various cataloging groups at the AALL Annual Meeting in Washington.

**AALL MARBI Representative Report
2008-2009**

*Prepared by: George Prager
New York University Law Library*

Introduction

The Machine-Readable Bibliographic Information Committee (MARBI) is an interdivisional joint committee of three units within the American Library Association. It is primarily responsible for the development of the MARC 21 formats. MARBI holds meetings twice a year, during ALA's Annual and Midwinter conferences. MARBI consists of nine voting members and three interns. The meetings are also attended by ex-officio representatives of national libraries and OCLC, and several dozen non-voting liaisons from ALA units and from non-ALA organizations with an interest in library automation standards. As the AALL representative to MARBI in 2009, I attended the MARBI meetings in Denver held during ALA Midwinter on January 24-25, 2009, and also the meetings held in Chicago, Illinois, on July 11-12, 2009, during the ALA Annual Meeting.

Several proposals and discussion papers relate to the mapping of *RDA* to MARC 21. These include: Proposals No. 2009-01/1, 2009-01/2, 2009-01/3, 2009-06/1, 2009-06/2, and 2009-06/3, and Discussion papers 2009-DP01/1, 2009-DP01/2, 2009-DP06/1, 2009-DP06/2, and 2009-DP06/3.

Internationalization of MARC 21 continues. The National Library of Spain and the Czech National Library both presented proposals to accommodate their conversion into MARC 21.

A new bibliographic field has been approved for cataloger's notes: field 588. Subfield \$x of the MARC Bibliographic 490 field has been made repeatable, so that ISSNs for both a series and a subseries may be transcribed in the same 490 field. Discussion papers on significant changes to the MARC 21 formats have been favorably received at the ALA Annual Meeting, and will be brought back as proposals at the 2010 ALA Midwinter. Two of the most noteworthy changes being considered are: Adding new fixed field codes to differentiate online resources from direct access electronic resources, and making the Cataloging source code (MARC Bibliographic 008/39) obsolete.

The agenda for the 2009 ALA Midwinter MARBI meetings is available at http://www.loc.gov/marc/marbi/mw2009_age.html.

The minutes for the 2009 ALA Midwinter MARBI meetings are at <http://www.loc.gov/marc/marbi/minutes/mw-09.html>.

The agenda for the 2009 ALA Annual MARBI meetings is at http://www.loc.gov/marc/marbi/an2009_age.html.

Minutes and updated cover sheets for the 2009 Annual MARBI meetings are not yet available as of July 22, 2009.

Summaries of all the 2009 Discussion papers and Proposals are given below, with links to the full papers. I have also included any changes made to the papers during the MARBI meetings, and subsequently by the Library of Congress' Network Development and MARC Standards Office.

Following a summary of all the 2009 MARBI papers I have discussed the October 2008 release of Update no. 9 to the MARC formats, and the latest OCLC plans for implementation of new MARC fields and subfields.

Proposal No. 2009-01/1: New data elements in the MARC 21 Authority Format

<http://www.loc.gov/marc/marbi/2009/2009-01-1.html>

New data elements will be needed in the MARC 21 Authority format to accommodate *Resource Description and Access (RDA)*. This proposal defines new data elements for attributes relating to FRBR Group 2 entities: persons, corporate bodies, and families as defined in *RDA*. These attributes are sometimes also needed in the access point for the entity. Those institutions which implement *RDA* in MARC 21 will need to decide whether or not to include the data element in the access point only, or also to record the information in one of the newly defined fields or subfields as well. The following new fields were proposed for the Authority format: field 046, and 621x fields 621-628.

Field 046 is already available in the Bibliographic format for Special coded dates, but many of the subfields are not appropriate for the Authority format. But since the data will be broadly similar in the two formats, it was decided to use field 046 but to choose different subfields. The dates include birth, death, and period of activity dates for persons, date of establishment or termination for corporate bodies, and any significant date for families. It is recommended that dates used in field 046 be encoded in a structured way, using an ISO 8601 compliant format.

The proposal for field 628 was approved with no changes at the ALA Midwinter Meeting. For the other 62x fields, the proposal was amended during and after the Midwinter Meeting to replace a single "Dates" subfield (\$d or \$t) with \$s (Start date) and \$t (End date), to provide more controlled searching. Also, at the meeting it was decided to add three more subfields to most of the new 62X fields: \$0 (linking to another authority record), another subfield (value as yet undetermined), for source of the information, and subfield \$u for link to a source of information.

As a result of discussion of No. 2009-DP-06/3 at the ALA Annual Meeting, the field tags were changed from the 62X range to the 3XX range. Proposal 2009-01/1 was updated in July 2009 to reflect the change in field names. The new fields include:

046	Special coded dates
370 originally proposed as 621	Associated place
371 originally proposed as 622	Address
372 originally proposed as 623	Field of activity
373 originally proposed as 624	Affiliation
374 originally proposed as 625	Occupation
375 originally proposed as 626	Gender
376 originally proposed as 627	Family information
377 originally proposed as 628	Associated language

Proposal No. 2009-01/2: New content designation for RDA elements: Content type, Media Type, Carrier Type in the MARC 21 Formats

<http://www.loc.gov/marc/marbi/2009/2009-01-2.html>

Three new fields have been proposed: Field 336 (Content type), 337 (Media type), and 338 (Carrier type). These fields are intended to replace the General material designation (GMD), defined in *AACR2*, and used in Bibliographic field 245. This proposal has been approved as amended: "Content type" will be used in the Bibliographic and Authority formats; "Media type" and "Carrier type" will be used in the Bibliographic and Holdings formats. The following subfields have been defined for all 3 fields: \$a Content type term, \$b Content type code, \$2 Source MARC code, \$3 Materials specified, \$6 Linkage, \$8 Field link and sequence number. Also, new values for "Carrier type" were proposed and have been approved for addition to the Bibliographic 007 field; no new values were deemed necessary for Content or Media type. Other carrier characteristics are also discussed in Proposal 2009-06/3 below.

Proposal No. 2009-01/3: Identifying work, expression and manifestation records in the MARC 21 Bibliographic and Authority Formats

<http://www.loc.gov/marc/marbi/2009/2009-01-3.html>

Field “883”: “Entity type” was proposed to identify FRBR type 1 entities: Work, expression, manifestation, and item. This proposal was rejected by the MARBI Committee. A major problem is that clean mapping of FRBR levels is difficult in our current bibliographic records, most of which contain manifestation information (such as publication information) and work information (such as subject headings), and sometimes expression level information as well (such as many uniform titles). Subsequent review by the Library of Congress (LC), Library and Archives Canada (LAC), and the British Library (BL) concurred with the MARBI decision.

Proposal No. 2009-02: Definition of new codes for legal deposits in 008/07 (Method of Acquisition) in the MARC 21 Holdings Format

<http://www.loc.gov/marc/marbi/2009/2009-02.html>

The Biblioteca Nacional de España has proposed new codes for legal deposit. This proposal was approved as amended: Code “d” will be renamed as “Deposit (Unspecified)”, and the definition will be revised. Code “l” (the letter) will be added for “Legal deposit” for institutions which require that level of description; Proposed Code “v” for “Depository program” was not approved; depository programs should go under code “d”. (For more background on this proposal, refer to the section on Discussion paper 2008-DP06 in my 2007-2008 Representative’s Report).

Proposal No. 2009-03: Definition of field 080 in the MARC 21 Authority Format

<http://www.loc.gov/marc/marbi/2009/2009-03.html>

The Authority format has separate fields for many other classification scheme numbers, all of which are also valid in the Bibliographic format. The Biblioteca Nacional de España has proposed the addition of field 080 for a Universal Decimal Classification number, to be used in name, series, and subject records. This field already is used in the Bibliographic format. Status: Approved.

Proposal No. 2009-04: Addition of Codes for Map Projections in 008/22-23 (Maps) in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-04.html>

The National Library of the Czech Republic has proposed two new fixed field codes for map projections. Status: Approved.

Proposal No. 2009-05: Adding subfield \$u for Uniform Resource Identifier to field 510 (Citation/References note) of the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-05.html>

Use of subfield \$u has grown in recent years to include many note fields, such as MARC Bibliographic fields 505, 520, and 545, and MARC Authority field 670. This subfield offers users access to online information that may be more current and more easily maintained outside of the MARC record. This proposal was approved. A recommendation will be added that the URI follow immediately after the citation. Although this proposal originated from the Bibliographic Standards Committee, ALA/ACRL Rare Books and Manuscripts Section, the usage will not be restricted to rare books and manuscripts, so examples will be added for citations to other types of material.

Proposal No. 2009-06/1: Accommodating Relationship Designators for RDA Appendix J and K in MARC 21 Bibliographic and Authority Formats

<http://www.loc.gov/marc/marbi/2009/2009-06-1.html>, and:

Discussion Paper No. 2009-DP01/2: Relationship Designators for RDA Appendix J and K

<http://www.loc.gov/marc/marbi/2009/2009-dp01-2.html>

Appendix J lists possible relationships between the Group 1 FRBR entities (resource to resource): works, expressions, manifestations, and items. Appendix K lists possible relationships between the Group 2 FRBR entities (name to name): persons, families, and corporate bodies. This Discussion paper recommends that subfields \$e, \$4, and \$u be added for use in linking entry fields of the Bibliographic format. It also recommends that subfields \$4 and \$e be added to 5XX fields in the Authority format wherever they are not yet authorized. The paper was discussed at the ALA Midwinter Meeting, but because the final texts of *RDA* were not yet available, no decisions were made at that time. It was brought back during the ALA Annual Meeting as Proposal No. 2009-06/1. The following changes were proposed in No. 2009-06/1:

1. Adjust the definition of subfield \$i in bibliographic linking fields (767-78X) to accommodate Appendix J (resource to resource links) relationship designators in textual form. It also suggests defining \$i in bibliographic fields X00, X10, X11, X30 for Appendix J relationship designators and adjusts the \$i definition in the 5XX fields of the Authority format for both Appendix J and K (name to name links) relationship designators.

-
2. Define subfield \$4 in bibliographic linking fields 76X-78X for Appendix J relationship designator codes.
 3. Rename Bibliographic field 787 (Nonspecific Relationship Entry) "Other relationship."

At the Annual Meeting, the proposal passed as amended. The most significant changes were: Subfield \$4 will also be added to 4XX and 5XX fields in the Authority format. The name for \$i will be changed from "Reference instruction phrase." "Relationship designator" will get into the MARC description of \$i. Field 787 will be renamed "Other relationship entry", rather than "Other relationship."

Here's an example from the paper of how \$i could be used in a 500 field of an authority record:

```
100 1 $a Snodgrass, Quintus Curtius, $d 1835-1910
500 1 $a Clemens, Samuel, $d 1835-1910 $i real identity
```

Proposal No. 2009-06/2: Transcribing Series and Subseries ISSNs

<http://www.loc.gov/marc/marbi/2009/2009-06-2.html>

When both a main series and a subseries each have an ISSN, AACR2 instructs us to transcribe only the ISSN of the subseries. *RDA* allows for the recording of both (this change to *RDA* was approved in March 2009). Currently, subfield \$x for ISSN in the series statement is not repeatable in the MARC Bibliographic format. No. 2009-06/2 redefines subfield \$x as repeatable. The proposal was approved at the ALA Annual Meeting.

Proposal No. 2009-06/3: New coded values for *RDA* media carriers in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-06-3.html>

RDA associates a group of carrier types with each media type. In April 2009, several new carrier types were added by the Joint Steering Committee to the description of *RDA* carriers. This proposal suggests that new coded values be added to field 007/01 and field 338 subfield \$b of the Bibliographic format for these new carrier types. (The format already allows the name of the carrier to be given in subfield \$a of field 338). This proposal passed without any changes. Other carrier characteristics are also discussed in Proposal 2009-01/2 above.

Proposal No. 2009-07: Definition of field 883 (Source of description, etc. note) in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-07.html>, and:

Discussion Paper No. 2009-DP02: Definition of field 588 for metadata control note in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-dp02.html>

The CONSER Standard Record-MARC Working Group recommended the definition of a new field for data connected with the creation or updating of a bibliographic record. By assigning this field a unique MARC tag, the field could be readily distinguished from other notes on a record of interest to public online catalog users. The information contained in this note would be primarily of interest to catalogers creating or maintaining records in a cooperative database such as OCLC. Typical notes would be for Source of the description, Description basis, Latest part consulted, Source of title, and Date viewed. While such notes appear most often in serial records, they also are used in records for multipart and for all types of integrating and electronic resources. At the MARBI Midwinter Meeting, it was suggested that the field be renamed, narrowed in scope, and made more structured, with possibly a value added to allow suppression of the field upon a case by case basis. Subfield "i" was also suggested for introductory text, as well as a \$5 for institution to which field applies. Additionally, first indicators were proposed for Blank: Free text; 0: Source of title; 1: Description based on; and 2: Latest issue consulted. Using these indicators for common messages of this type will minimize keying, lessen spelling errors, and provide useful information in a language neutral manner.

This DP was brought back at ALA Annual as Proposal No. 2009-07, but prior to the meeting, the field tag was changed in the proposal's name from 588 to 883. After much spirited discussion during the ALA Annual Meeting, the proposal passed as amended. Field 588, the original field suggested in the DP, will be used, not field 883. The field will be called "Cataloger's note" rather than "Source of description, etc. Note". Many members of the MARBI Committee thought that there was insufficient justification for adding multiple subfields for different types of notes, so only subfield \$a (repeatable) will be used for this type of information. Subfields \$5 (Institution to which field applies), \$6 (Linkage), and \$8 (Field and sequence number), will also be added. Subfield \$i was not added, nor was an indicator for suppression of the field.

Proposal No. 2009-08: Changes to field 257 (Country of Producing Entity) for use with non-archival materials in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-08.html>, and:

Discussion Paper No. 2009-DP03: Changing field 257 (Country of producing entity for archival films) of the MARC 21 Bibliographic Format to include non-archival materials

<http://www.loc.gov/marc/marbi/2009/2009-dp03.html>

Despite widespread interest in access to information about the country of production for nonarchival films, this information can only be given in MARC Bibliographic field 655 (Index Term—Genre/Form), with a subfield \$2 for the source of the term coded as “local.” (LC’s current position is that geographic subdivisions are not allowed after form/genre headings unless they are coded in such a manner). The Online Audiovisual Catalogers Group (OLAC) has proposed that field 257, currently restricted to information on the country of production for archival films, be broadened to include information about non-archival films as well. At the ALA Annual Meeting, this proposal passed as amended. Field 257 will be added to the format as a repeatable field, with subfield \$a repeatable as well. When a bibliographic record describes multiple films, each film will have its own 257 field. If multiple countries are involved in the co-production of a film, each country will be entered in its own \$a.

Proposal No. 2009-09: Adding new codes to Music 008/18-19 (Form of composition) in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-09.html>

The National Library of Spain has proposed adding codes for four musical forms of composition in field 008. These codes may also be used in field 047 (Form of musical composition) subfield \$a. Codes for zarzuelas, flamenco, villancicos, and lyric theater music were approved, with the name of the last mentioned changed to “Teatro lyricico.”

Proposal No. 2009-10: Adding subfield \$3 to field 534 in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-10.html>

This proposal also originated from the National Library of Spain. Field 534 is used for an “original version note” when the main portion of a bibliographic record describes a reproduction. A subfield \$3 in this field would indicate the part of the original version from which the reproduction recorded in the main body of the record was made. It would parallel the current use of this subfield in field 533. The proposal passed without changes at the ALA Annual Meeting.

Discussion Paper No. 2009-DP01/1: Encoding URIs for controlled values in MARC records

<http://www.loc.gov/marc/marbi/2009/2009-dp01-1.html>, and:

Discussion Paper No. 2009-DP06/1: Encoding URIs for controlled values in MARC 21 records

<http://www.loc.gov/marc/marbi/2009/2009-dp06-1.html>

LC’s Network Development and MARC Standards Office is working on a registry for controlled lists (such as the MARC Code List for Languages), and establishing uniform resource identifiers (URIs) both for the list itself and for each value on the list. Other agencies are also developing URI lists. 2009-DP 01/1, presented at ALA Midwinter, proposes a new subfield “1” (the number “1”), for coding URIs in place of, or in addition to, using terms from a controlled vocabulary. While both \$1 and \$u may contain a URI, they differ in use. Subfield “1” links to a vocabulary value; subfield “u” most commonly links to a bibliographic entity that is the resource described, a related resource, or supplemental information.

This DP was brought back again at the ALA Annual Meeting as 2009-DP06-1. The later paper also presented an option of using MARCXML attributes to carry a URI for controlled values, in addition to “classic” MARC 21 (technically known as MARC 2709). During the Annual Meeting, it was stressed that while “*RDA*-compliant” records can be created without URIs, it would be worth exploring just how the URIs might be used in systems. One problem with the proposal (as expressed in both DPs), is that systems must depend upon the order of subfields to make the URI subfield meaningful. After much discussion during ALA Annual, it was decided not to bring forward 2009-DP06-1 as a proposal. Several people on the MARBI Committee felt that a new DP was needed, to explore what is the best way of doing experimentation in MARC.

Discussion Paper No. 2009-DP01/2. See above under: Proposal No. 2009-06/1

Discussion Paper No. 2009-DP02. See above under: Proposal No. 2009-07

Discussion Paper No. 2009-DP03. See above under: Proposal No. 2009-08

Discussion Paper No. 2009-DP04: Adding codes for “online access” and “direct access” in 008 for Form of item in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-dp04.html>

This proposal originated from the PCC Provider-Neutral E-Monograph Record Task Group, a group which I co-chaired. Soon after we began our work on the task group, it became apparent to us that records for online electronic resources are not clearly distinguished from records for direct access electronic resources in the MARC 21 Bibliographic format. The paper discussed the limitations of fields currently being used in the format to indicate that the record represents an electronic

resource, a resource with electronic aspects, or is accompanied/supplemented by an electronic resource. MARC fields which will be used in *RDA* for this purpose were also discussed. We presented three options for Form of item codes, with the first option being the preferred one:

Make code “s” (electronic) obsolete in the Form of item fields across all formats. Define new codes “r” or online and “d” for direct access.

Question 1 of the paper asked if field 008/23 should be added to the Computer File format (Leader 06 “m”), since this is the one Bibliographic format where there is no field for Form of item. Adding this field would help to more clearly mark records for online resources such as numeric data or fonts.

At the ALA Annual Meeting, there was a discussion about how networked CD-ROMs should be coded. Most Committee members felt that electronic resources should be coded for how they have been issued, not for how they are being used by an individual institution. In bibliographic utilities or union catalogs, CD-ROMs should be coded as “direct access”; in an OPAC, networked CD-ROMs might be coded however the institution wishes, either as direct or online access.

This DP will be brought back as a proposal at ALA Midwinter 2010. The MARBI Committee preferred the first option, and was also in favor of “Form of item” being added to the Computer File format. Codes “o” for online and “p” for direct access will be proposed, rather than codes “r” and “d”, which are not available across all formats.

Discussion Paper No. 2009-DP05: Making 008/39 (Cataloging source) obsolete in the MARC 21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-dp05.html>

This code is defined in both the MARC 21 Bibliographic and Authority formats as a “one character code that indicates the original cataloging source of the record.” However, when PCC participants authenticate a bibliographic record which was not created at the national level, they change the Cataloging Source code from its existing value (usually “d” for “other”) to “c” (cooperative cataloging programs) or “#” (national library agencies). There is a resulting disconnect between the definition of the code in the MARC format and its actual use: it ends up reflecting the authoritativeness of the record in respect to national level cataloging rather than the cataloging source. Since code 040 and 042 are more reliable indicators of the source and the authoritativeness of the record, this DP proposes to make 008/39 obsolete. There was some discussion at the ALA Annual Meeting as to whether the code should be made obsolete, or a fill character should be used instead. This Discussion paper will be brought back as a proposal at ALA Midwinter 2010.

Discussion Paper No. 2009-DP06/1. See above under: Discussion Paper No. 2009-DP01/1

Discussion Paper No. 2009-DP06/2: Enhancing Field 033 and Field 518 for Place and Date of Capture in the MARC21 Bibliographic Format

<http://www.loc.gov/marc/marbi/2009/2009-dp06-2.html>

The MARC/*RDA* Working Group has assessed all instances where the granularity of data in *RDA* and the MARC 21 formats are not in alignment. One such area is fields 033 and 518, which map to two separate *RDA* elements, Place of Capture (7.11.2) and Date of Capture (7.11.3). Field 033 provides more granularity and is controlled and structured; field 518 is in note form. Field 033 allows for place of capture up to and including the city level, but does not usually allow for specificity beyond this level. Such information may be given in the eye-readable 518 field: Recorded at New York University Law School, New York, July 2009. Field 518 does not reflect *RDA*’s separation of date and place of capture, since it gives both *RDA* elements together in the same subfield. DP-06/2 proposes that the following subfields be added:

Field 033 \$d Name of place [beyond what can be specified in the codes]
Field 518 \$d Date of capture; \$i Introductory phrase; \$p Place of capture

The German National Library would also like \$0 and \$2 added to field 033 to control the newly proposed \$d Name of place. These control fields would link to an authority file. This Discussion paper will be brought back as a proposal at ALA Midwinter 2010.

Discussion Paper No. 2009-DP06/3: New data elements in the MARC 21 Authority and Bibliographic Format for works and expressions

<http://www.loc.gov/marc/marbi/2009/2009-dp06-3.html>

This paper offers definitions of new data elements for attributes of works and expressions as defined in *RDA*. Not all the elements are needed for MARC 21 *RDA* records; some of them are intended to be used at first for FRBR experimentation, such as creating bibliographic records at the work or expression level. Like the elements defined in Proposal No. 2009-01/1 (above), some of these elements may also be needed in the access point for the entity. The new data elements needed in the

Authority and Bibliographic formats include: Other distinguishing characteristics of the work [or] expression, Medium of performance, Numeric designation of a musical work, and Key. Form of work is also needed for the Authority format, and its placement in the Bibliographic format needs to be determined (field 653 or 655 could be used). In this Discussion paper, the fields for these new elements are indicated by letters, such as “AAA” for Form of work; the consideration of which MARC fields to use was deferred to the MARBI meetings at ALA Annual. At that meeting, the Committee voted to define the new authority fields in the 33X range. (As a related change, the as yet unimplemented 62X authority fields approved in Proposal No. 2009-01/1 will be changed to the 37X range). Fields 653 or 655 will be proposed for the Authority Form of work when this DP returns as a proposal at ALA Midwinter in 2010. Other *RDA* elements will be considered for inclusion into the Authority format, such as Signatory to a treaty, Title of a person, Fuller form of name, etc.

MARC Formats Interest Group (MFIG) Meeting July 11, 2009

This meeting consisted of two very informative presentations. The first speaker was Reinhold Heuvelmann, a MARC Advisory Committee liaison from the Deutsche Nationalbibliothek, who gave a fascinating presentation entitled “The German and Austrian Version of MARC 21 : Standard Compliance, Flexibility, and Implementations”. The second speaker was Richard N. Leigh, audiovisual cataloger at the University of Maryland and chair of the MFIG, who spoke on “Fun with Crosswalks: the Challenges (and Joys?) of Crosswalking out of MARC Formats”.

MARC 21 Update No. 9: Full and Concise available online

As announced on the MARC listserv on Oct. 31, 2008 (6:11 pm), Update No. 9 (October 2008) has been made available on the MARC website (www.loc.gov/marc/). It is fully incorporated into the documentation for each of the online Full and Concise formats—the Bibliographic, Authority, Holdings, Classification, and Community Information formats. The documentation includes changes made to the MARC 21 formats resulting from proposals which were considered at the MARBI Meetings in 2008.

The changes are indicated in red. Format changes for each of the five formats are listed in separate appendices. Users are cautioned not to begin using the new features in the format until 60 days from the date of the announcement. For background information on the changes enumerated in the appendices, see the AALL MARBI Representative Report for 2007-2008 at <http://www.aallnet.org/sis/obssis/reports/Marbi2008.pdf>

MARC 21 Format Changes to Accommodate *RDA* (Draft)

LC has posted new documentation listing all the MARC 21 format changes related to *RDA* since the MARC 2008 Update (No. 9) at <http://www.loc.gov/marc/formatchanges-RDA.html>. As of July 22, 2009, this document has not yet been updated to indicate that the 62X authority fields were changed at the ALA Annual Meeting to 37x fields. The proposed subfield \$1 mentioned in the document for value URIs was not approved at the recent MARBI Meeting. Information on the new fields will be published as part of the MARC 2009 Update (No. 10) later this year.

OCLC-MARC Format Changes in 2009

As announced on the OCLC-CAT listserv on July 22, 2009 (9:38 AM), “On August 16, 2009, OCLC plans to implement the changes related to the OCLC-MARC Bibliographic, Authority, and Holdings Formats Update 2009. This will include MARC 21 Updates No. 8 (October 2007) and No. 9 (October 2008), MARC Code List changes since July 2008, and user and OCLC staff suggestions. OCLC *Technical Bulletin* 257, which presents the details, is now available at <http://www.oclc.org/support/documentation/worldcat/tb/257/default.htm>.” The most significant changes include:

- Linking ISSNs (ISSN-L) in bibliographic, authority, and holdings fields 022.
- Implementing the repeatable 260 field. (For more information on how the repeatable 260 fields should be used, refer to the draft document of June 11, 2009 entitled: *LC/PCC guidelines for MARC 21 repeatable 260 field*. Available at <http://www.loc.gov/catdir/pcc/260-repeat-2009-June11.pdf>). OCLC recommends not using the repeatable 260 field until the draft version of the PCC guidelines are finalized and the revised Library of Congress Rule Interpretation 1.4 is issued. It will be interesting—to say the least, to see how and when the repeatable 260 field is implemented by our OPAC vendors.
- Making field 440 obsolete and converting appropriate 4XX/8XX combinations. (For information on PCC series policy, see: Series policies and practices 2006-2009 at <http://www.loc.gov/catdir/pcc/seriesPCC.html>).
- Defining new subfields in field 502 for dissertation details (degree, school, date, etc.).
- Implementing new field 542 for Information Relating to Copyright Status.
- Implementing subfield \$0 (zero) for the Authority Record Control Number in 28 bibliographic fields and three authority fields. OCLC does not want \$0 used in the master records (the control headings function should be used instead). Local authority identifiers may be entered in subfield \$0 locally.

**Report of the AALL Representative to the American Library Association
Association for Library Collection and Technical Services
Cataloging and Classification Section
Subject Analysis Committee (SAC)
Midwinter Meeting, Denver, January 2009
Annual Meeting, Chicago, July 2009**

*Yael Mandelstam
Fordham Law School Library*

The Subject Analysis Committee studies problems and recommends improvements in patterns, methods, and tools for the subject analysis, organization, and retrieval of information resources, and provides liaison for those areas of interest between CCS and other ALA and non-ALA organizations that have an interest in and concern for these activities.

Currently SAC has liaisons from the Program of Cooperative Cataloging (PCC), MARBI, the Library of Congress Policy and Standards Division (PSD), the American Association of Law Libraries (AALL), the Art Libraries Society of North America (RLIS/NA), the Music Library Association (MLA), the International Federation of Library Associations and Institutions (IFLA), the Sears List of Subject Headings, the LC Decimal Classification Division, the Dewey Classification and OCLC Dewey Services, and the Dewey Classification Editorial Policy Committee.

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

Subcommittee on Genre/Form Implementation

The subcommittee acts as a facilitator of two-way communication between the Library of Congress Policy and Standards Division (PSD) and the cataloging communities with interest in genre/form headings.

In its ALA Midwinter and Annual meetings, the subcommittee heard progress reports on genre/form projects from the Library of Congress, the Music Library Association, and the American Association of Law Libraries. At ALA Annual, the subcommittee approved a short list of general terms useful for law collections provided by the AALL Law Genre/Form liaison. Members of the subcommittee also decided to send a proposal to PSD regarding the creation of a list of genre/form terms used across disciplines, based on LCSH 185 form subdivisions.

The subcommittee is planning to synthesize the comments posted on the group's Listserv (<http://lists.ala.org/sympa/arc/form-genre>), and formulate recommendations to PSD regarding various genre/form-related issues. The first to be addressed is the issue of subdividing genre/form headings by place, language, etc. Alternatives to subdivisions will also be considered (e.g., use of 655 \$8 – Genre/Form Term–Field link and sequence number).

Subcommittee on FAST (Faceted Application of Subject Terminology)

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

As of July 2009, the FAST authority file contained 1,629,309 terms for topics, forms, personal and corporate names, geographic names, events, periods, and uniform titles. The latest versions of the FAST database and the FAST manual are available at <http://fast.oclc.org>.

Highlights from reports submitted by Janis Young, the Library of Congress Policy and Standards Division (PSD)

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

- **Genre/Form Headings.** For general information about genre/form headings and *LCSH* at the Library of Congress, including a Genre/Form Frequently Asked Questions PDF document as well as a full timeline, visit <http://www.loc.gov/catdir/cpsoc/genreformgeneral.html>. The following announcements and documents have recently been added to the site: Genre/Form Headings for Musical Works; SACO Proposals for Moving Image and Radio Program Genre/Form Headings; Genre/Form Headings for Cartographic Materials; Proposed Change to the Structure of *LCSH* Subdivisions Used for Cartographic Materials Discussion Paper; and Disposition of Video Recording Headings in the New Genre/Form Environment Discussion Paper.
- **Library of Congress Subject Headings (LCSH) 31st edition.** *Library of Congress Subject Headings (LCSH)* 31st edition is available at the end of June 2009. Because there has been no edition of *LCSH* published since 2007, this edition will include approximately 17,000 new and 16,000 changed subject headings made since January 2007.

LCSH 31st edition will be enlarged to six volumes. The new, sixth volume, *LCSH* Supplementary Vocabularies, will include free-floating subdivisions, genre/form headings, and children's subject headings. *LCSH* 31 is available for \$295 in North America and \$345 outside North America. Copies may be ordered at www.loc.gov/cds/contact.html.

- **Subject Headings Manual.** Formerly known as the *Subject Cataloging Manual: Subject Headings*, the 2008 edition of the manual was published under the title *Subject Headings Manual*. This new edition consolidates the previous updates and complements the *Classification and Shelving Manual*, published in May 2008.
 - **Subject Headings Projects.** PSD has recently undertaken several short-term projects to update subject headings and references, to bring them into alignment with current standards as defined by the *Subject Headings Manual*, or to modify outdated language. Some examples are:
 - Headings with inverted religious qualifiers are being revised to natural-language forms (e.g., **Cave temples, Buddhist** was updated to **Buddhist cave temples**)
 - Headings for types of insurance and bridges were revised to appear in direct form (e.g., **Insurance, Automobile** became **Automobile insurance** and **Bridges, Concrete** became **Concrete bridges**)
 - **Alien labor** was updated to **Foreign workers**
 - **Transcaucasia** was updated to **South Caucasia**, the current terms; all uses of the phrase “Transcaucasian” was updated to “South Caucasian”
 - The headings for Kosovo and all related headings were updated when Kosovo declared its independence from Serbia in early 2008
 - PSD worked with the American Association of Law Libraries (AALL) on a project to assist catalogers in determining whether individual headings are inherently legal. AALL provided the Division with lists of headings that its members determined to be inherently legal; the Division vetted the lists and added a reference from topic subdivided by **–Law and legislation** where appropriate (e.g., *Abuse of rights–Law and legislation* **SEE Abuse of rights**)

In each case, all related records were also updated.

The headings for the U.S. Census were also modified to remove the census number (e.g., **United States–Census, 1st, 1790** was updated to **United States–Census, 1790**). This change brings the treatment of the U.S. Census into agreements with the treatment of other census.

A broader term in the form **[War]–Campaigns–[Place]** is now being added to headings for bombardments that occur as part of wars. The existing headings were updated.

PSD and the British Library have undertaken a project to standardize the plural qualifiers in headings for classes of locomotives, and to update the broader terms so they reflect the specific type of locomotive (steam, diesel, etc.) instead of the more general **Locomotives**.

- **Library of Congress Classification.** Available from the Cataloging Distribution Service are new print 2009 editions of K (Law in General. Comparative and Uniform Law. Jurisprudence), T (Technology), and Z (Bibliography. Library Science. Information Resources).
- **Drafts of KBS and KBT.** Drafts of the newly developed subclasses KBS (Canon Law of Eastern Churches) and KBT (Canon Law of Eastern Rite Churches in Communion with the Holy See of Rome), have been posted for an extended trial period for cataloging and collection staff at the Library of Congress and at other institutions. Users of these drafts should note the substantial revisions and restructuring in overlap areas with the older classes KBR and KBU, as well as with subclasses BR (Christianity) and BX (Christian Denominations), in the Religion schedule. The drafts are available in the form of PDF files at <http://www.loc.gov/catdir/cpsd/KBS-KBT.html>.
- **Cyrillic forms in LCC subclass PG.** Cyrillic forms are in the process of being added to captions in subclass PG for individual literary authors and titles of belletristic works written in Cyrillic script. In addition, authors' death dates are being added to many of these captions.
- **Cataloger's Desktop.** “Desktop 3.0” – A major modernization of the product to enhance searching and navigation will be completed after the ALA annual meeting. Visit www.loc.gov/cds/desktop for the latest news. This online cataloging and metadata documentation service now features more than 280 resources, as well as Spanish-, French-, and German-language interfaces.
- **LC Authorities and Vocabularies service.** The Library of Congress has opened its **id.loc.gov** Webservice, “Authorities and Vocabularies”, with the Library of Congress Subject Headings (*LCSH*) as the initial offering.

The primary goal of this service is to enable machines to programmatically access data at the Library of Congress, but the web interface also provides simple access for human users. This service is a step toward exposing and interconnecting vocabulary and thesaurus data at no cost via URLs. For *LCSH*, terms have been linked to a similar service provided in Europe for *RAMEAU*, a French subject heading vocabulary closely coordinated with *LCSH*. The Library is interested in feedback on the uses and usefulness of the service to inform ways that we might enhance it. (There is a comment form at the site.) Over the next few months the service will be expanding to include other vocabularies commonly found in standards that the Library supports such as the *Thesaurus of Graphic Materials*; geographic area, language, and relator codes; and preservation events and roles. The site is accessible at <http://id.loc.gov>.

- **Cataloging Service Bulletin Back Issues.** All issues (1-123, summer 1978-spring 2009) of *Cataloging Service Bulletin (CSB)* are now available at no cost at <http://www.loc.gov/cds/PDFdownloads/csb>. The entire 31 years of *CSB* are made available by LC as a free service to the worldwide library community. The issues are also available and searchable in *Cataloger's Desktop*.
- **Virtual International Authority File (VIAF).** At the end of 2008, the Library of Congress, the Deutsche Nationalbibliothek, the Bibliothèque nationale de France, and OCLC signed a new agreement to add the National Library of Sweden as the next partner to the VIAF. Since then, the National Library of the Czech Republic, the National Library of Israel, the Bibliotheca Alexandrina (Egypt), the Vatican Library, the National Library of Portugal, and the National Library of Spain have formally been added. An additional 10 institutions have submitted applications and are expected to be added during 2009. VIAF is a service that matches and links the world's large personal name authority files. The beta version currently includes more than 10.4 million personal name authority records, accessible at www.viaf.org. During 2008 VIAF expanded to include non-Latin characters. Future plans are to expand to geographic names, corporate names, and uniform titles.

OCLC Update and Roundtable

Ming Lu
Los Angeles County Law Library

The OCLC Update and Roundtable sessions were held on July 26, 2009 at the AALL Annual Meeting in Washington, D.C. Keiko Okuhara, co-chair of the OBS-SIS OCLC Committee, opened the Update by welcoming everyone. Co-chair Ming Lu concluded the Roundtable by summarizing the two OCLC sessions. Approximately 40 people from OCLC's user groups attended. Glenn Patton, director of the WorldCat Quality Management Division at OCLC, provided PowerPoint presentations in both the Update and Roundtable sessions on the following six topics:

1. OCLC record use policy: Glenn reported briefly that the Review Board on June 22 recommended that the OCLC Board of Trustees withdraw the policy and start over with a new committee. The Trustees adopted that recommendation on June 26. A new committee is being formed to write a new policy.
2. Research report on *Online Catalogs - What Users and Librarians Want*: Glenn summarized the report by noting what users expect from online catalogs (look like popular websites; have summaries, abstracts, tables of contents); and what librarians expect (serve end-users' information needs; help staff carry out work responsibilities; have accurate, structured data). Glenn also reviewed the classical principles of information organization contrasted with end users' definition of quality. What is needed now is to integrate the best of both worlds in new, expanded definitions of what quality means in library online catalogs.
3. OCLC web-scale management services: Glenn discussed OCLC's work in web-scale management. The goal is to move from first generation library web-scale (resource sharing, cataloging, licensed literature, and consortium activities) to next generation web-scale (digital repositories, unified discovery layer, electronic records management, and library management). OCLC is looking at more efficient management work flow applications that libraries will use without having to worry about the supporting technology, thus reducing the total cost of ownership.
4. WorldCat Local: The WorldCat cooperative library system provides a global platform for library automation to its library members. Glenn talked about its current place and its future possibility. Current issues he discussed included the WorldCat Local discussion list, quarterly user group meetings, usability testing, usage trends and feedback. The WebJunction community could be the next step.
5. Expert community experiment: All OCLC cataloging members with full level authorizations have been invited to enhance any non-PCC records in WorldCat. Glenn introduced the project's background, progress, activities and importance. He also

went over what we have learned so far. Extra monitoring of user activities and evaluation of the experiment as a whole will be done in the near future.

6. The xISSN service: This service is about serials management. There has been no good tool for automatically tracing publication histories. Now OCLC xISSN's web service could increase efficiency in serials management and improve library resource discovery by providing much richer sets of metadata with complete title history, associated OCLC numbers and extent statements.

OBS-SIS Special Committee on Record Sharing 2009 Annual Report

*Reported by
Pat Callahan, Chair*

The Special Committee on Record Sharing met at the AALL conference in Portland on Monday, July 14, 2008. A draft "Statement on Ethical Sharing of Electronic Records and Guidelines for Electronic Record Sharing" was distributed.

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

After discussion, it was decided that the draft "Statement on Ethical Sharing of Electronic Records and Guidelines for Electronic Record Sharing" would be submitted to the OBS-SIS Board for comment and then, hopefully, to the AALL Executive Board. That process has been underway during the past year. The document may be submitted to the AALL Board for discussion at its fall meeting.

In March, at the request of the AALL Executive Board, the Chair of the OBS-SIS submitted a resolution to the Board regarding the OCLC "Policy for Use and Transfer of WorldCat Records" that was published in November 2008. The resolution recommended that the Policy be abandoned. The Special Committee contributed feedback and suggestions that accompanied the resolution. These documents were then submitted to the OCLC Review Board of Shared Data Creation and Stewardship.

The Special Committee recently contributed suggestions for a new OCLC policy in response to the request from the OCLC Review Board of Shared Data Creation and Stewardship. These will be presented at the 2009 TS-SIS Hot Topic program "Working with OCLC's Record Transfer Policy" at the AALL conference.

This year's committee meeting time (Monday, July 27 4:00-5:15) has been set aside for further discussion of recommendations for a new OCLC Policy, if there is interest.

OBS-SIS Special Committee on Record Sharing 2009 Committee Meeting Report

*Reported by
Pat Callahan, Chair*

The OBS-SIS Special Committee on Record Sharing met at the AALL conference in Washington D.C. Monday, July 27 4:00-5:15. Several members of the committee and others interested in the topic were in attendance.

Pat Callahan, committee chair, announced that at its July 25 meeting the OBS-SIS Executive Board had approved sending the committee's "Statement on Ethical Sharing of Electronic Records and Guidelines for Electronic Record Sharing" to the AALL Executive Board with a request that the Board endorse the policy before it is distributed to library organizations and vendors. The document will be submitted for consideration at the AALL Board's fall meeting.

Because the committee meeting took place shortly after the TS-SIS Hot Topic program on "Working with OCLC's Record Transfer Policy," discussion turned to the OCLC record transfer policy and other OCLC-related record sharing issues.

The committee has strongly recommended that OBS-SIS and TS-SIS work together in an effort to provide both feedback and representation to the group that OCLC appoints to draft a new record transfer policy.

OBS-SIS/TS-SIS Joint Research Grant Committee 2008-2009 Annual Report

*Ruth Funabiki
University of Idaho Law Library*

Chair Ruth Funabiki convened the Committee meeting in Portland in July 2008.

Membership of the 2008-09 Committee included Richard Amelung (ex-officio), Pam Deemer (2008-10), Barbara Henigman (2008-10), Ruth Funabiki (Chair, 2007-09), Chris Long (2007-09), and Patricia Satzer (2007-09).

Both OBS-SIS and TS-SIS budgeted funds for the grant to be awarded in 2008-09. Each SIS was prepared to fund \$500 for a project.

At the 2008 OBS-SIS Board meeting, there was a discussion of how to better publicize the grant opportunity. Although the Chair did not follow through on several of those plans, the grant opportunity received more mention this year than last. Information about the grant was posted on the OBS-SIS Facebook page on August 6, 2008. In addition, the grant was featured in March 2009 in Hollie White's *Technical Services Law Librarian* "Research & Publications" column.

No inquiries or applications were received between the time of the announcement and the June 15 deadline for applications.

The principal agenda item for the meeting in Washington will be to once again address the question of how to best publicize and promote the grant opportunity. If publicity increases substantially without a response in the coming year, I think the SISs should consider whether the grant program should be dropped.

OBS/TS/CS-SIS NISO Training Session

*Reported by
Michael Maben
Indiana University Law Library*

Mary Alice Baish, AALL Government Relations Office (coordinator); Michael Maben, Indiana University Law Library (moderator); Karen Wetzel, NISO (speaker)

This session was led by Karen Wetzel, the Standards Program Manager with NISO, the National Information Standards Organization. It was designed to help law librarians understand how NISO does its work and how we as law librarians can review and comment on the proposals. AALL is a dues-paying member of NISO, thus we have the right and responsibility to be involved in the standards process. Ms. Wetzel went through how a standard is proposed; the process of comments, review, and revision; and eventually either adoption or rejection. NISO is anxious to have its proposals reviewed, and the AALL Government Relations Office is always seeking volunteers from within AALL to review proposals. The session was a good give-and-take discussion with Ms. Wetzel, and it is hoped that more law librarians will volunteer to review NISO proposals.

TS-SIS Acquisitions Committee 2009 Committee Business Meeting and Roundtable Report

*Earlene Kuester
Stetson University College of Law*

The TS-SIS Acquisitions Committee Business Meeting was called to order on Monday, July 27, 2009 at 7:00 a.m. at the Washington Convention Center Room 143B by Ajaye Bloomstone, Acquisitions Librarian, Louisiana State University, Paul M. Hebert Law Center Library.

Attendees: Shyama Agrawal, Lisa Arm, Jada Aitchison, Heather Buckwalter, Catherine Bye, Marilyn Estes, Mary Gallant, Bonnie Geldmacher, Jo-Anne Giammattei, Cecily Giardina, Ismael Gullon, Edward Hart, Barb Henigman, Alan Keely, Ann Kolodzey, Earlene Kuester, Clement Lau, Paul Mastrangelo, Mary McKee, Wendy Moore, Jim Mumm, Cynthia Myers, Eric Parker, Anne Robbins, Pat Roncevich, H.C. Singh, Lorna Tang, Dick Vaughan, Nicole Wigen and Ajaye Bloomstone (Chair).

The business meeting began at 7:05 a.m. A motion was made and seconded to approve the minutes of last year's meeting. Introductions for everyone followed.

Old Business:**Task Force Reports:**

The ACQWEB report was given by Anne Robbins. ALA has the template for ACQWEB on the Drupal CS platform. It is almost ready for content to be added and Anne will send out the link. Eleanor Cook, who originated ACQWEB, has transitioned away from it. There will be a call for assistance for content. Ajaye passed around a prototype for the splash page. Lisa Arm asked if it would be a wiki; Anne replied that it will be wiki-like. Ajaye will be the gatekeeper for the site.

The Collection Development Policies report was given by Eric Parker. ALL-SIS has some, but they are password protected. The policies can be kept in one place or ALL-SIS can keep their own collection. Lisa Arm volunteered to coordinate with ALL-SIS.

Format for the Committee/Roundtable Meetings: Ajaye polled the committee for comments on the current meeting format: 45 minutes for the business meeting and 45 minutes for the Roundtable discussion. With no comments, the current format will continue.

New Business:**Programs for 2010:**

The theme for 2010 is "Mapping our Future." If requesting TS-SIS sponsorship, program proposals must be submitted to the TS-SIS Education Committee by August 10, 2009, otherwise they can be submitted to AMPC directly without sponsorship by August 23, 2009.

Pat Roncevich was contacted by a vendor with online content and asked if they would like to be the first to own it. They could create their own content in the library, so they wouldn't have to pay an annual fee. Is this doable and how expensive would it be?

Ajaye mentioned that LSU was finally enduring budget cuts. She is concerned about the psychological issues involved when this happens. The library is far from closing [laughter], but the collection is being consolidated.

Ann Kolodzey said that in the old days you could pick the titles to cancel. These days everything is in bundles from vendors. There are new pricing models, which brings up negotiating with vendor and also vendor viability. Alan Keely spoke about not being able to afford a price increase from a vendor, but offered to commit to certain dollar purchase for three years. Vendors are willing to negotiate and work with libraries.

Ajaye's term as Chair of the Acquisitions Committee will be up at the end of the 2010 conference. She is asking for those interested in the position to contact her.

A motion was made, seconded, and carried to adjourn the Business Meeting at 7:45 a.m.

Roundtable Meeting:

The Roundtable Meeting began at 7:45 a.m. Lisa Arm mentioned that their main library is switching from III Millennium to OCLC WorldCat for their catalog. There is resistance in the law library, because they won't be able to see the library's real record, only the OCLC record. They are concerned about migrating to a new system with no real input in the decision. The main library's rationale for the switch is that WorldCat looks nicer, it's easier to use and has more features. Yale will be beta testing III's new database collection of records that will be competition for OCLC. Wake Forest rejected WorldCat Local, because they thought it would give OCLC too much control.

Wendy Moore brought up problems with contacting Wolters-Kluwer. She has no rep to contact. There are also many problems with Intelliconnect. They are pushing the problem solving onto the library. A discussion ensued about training reps not to call; the librarian will call when they have orders. Intelliconnect problems generally happen with off-campus access. Where and when you register depends on how the account is set up. There is title linkage in the catalog, but title access in the database only with a browse function. During the transition period, you end up using both platforms. It's better to go direct to Intelliconnect. Wolters-Kluwer are also taking titles off the database and charging separately for them. It was suggested that people go to the Wolters-Kluwer booth & complain.

The Roundtable was adjourned at 8:30 a.m.

TS-SIS Serials Standing Committee 2009 Committee Meeting Report

*Shyama Agrawal
Duke Law Library*

Carol Nicholson introduced Shyama Agrawal, the incoming chair of the Serials Standing Committee. Members thanked Carol for her years of steering the committee so successfully.

“Managing from the Middle: Techniques for Success in Technical Services,” the workshop co-coordinated by Carol Nicholson and Karen Douglas, and “Here Today Gone To-morrow? The Future of Print Periodicals in Law Libraries,” the program moderated by Ann Kolodzey, were very well received.

Michele Pope, chair of the Exchange of Duplicates program, reported that this year 36 libraries participated in the program. A credit card payment option was added this year on the registration form.

Lorna Tang reported that the Project COUNTER Task Group, chaired by Shyama Agrawal, has an updated link to COUNTER-compliant vendors listed on the Project COUNTER website. The group has created and posted a sample letter to vendors for COUNTER compliance on its website. The group is also working on compiling a document on different resources and tools used by libraries to collect usage statistics.

TS-SIS Task Force on the Annual Survey Report, June 30, 2009

The Task Force on the Annual Survey was formed under the direction of TS-SIS Chair Linda Tesar in the summer of 2008. She appointed Joe Thomas (Chair), Chris Long, Alan Keely, Sean Chen, Sara Robertson, Katie Jones, and Martin Wisneski.

The charge to the Task Force included formulating answers to these questions:

1. Should TS-SIS continue to distribute a survey? What do we need to accomplish through the survey?
2. What form should the survey take? Should it only be a call for volunteers or should it be something else?
3. What impact, if any, will the implementation of the committee volunteer webform have on the survey? Should the volunteer form be expanded?
4. What role, if any, should the Membership Committee play in conducting the annual survey?
5. Are there better mechanisms to satisfy our needs? Do new technologies exist that TS-SIS should implement instead of an annual survey?

The Task Force corresponded by email and determined that the three functions of the TS-SIS annual survey have been:

1. Find out what about the TS SIS’s activities (mostly annual meeting programs and *TSL* columns) people liked or disliked;
2. Gather suggestions for annual meeting programs or other educational opportunities;
3. Recruit members to run for SIS offices or to serve on committees.

There was general agreement that the attempt to gather information about members of the SIS and their opinions about the workings of the SIS should be separated from any attempt to recruit volunteers for SIS activities and offices. It was suggested (without, of course, any statistical analysis to back it up) that some members might be reluctant to fill out informational surveys if they were simultaneously being asked to consider performing volunteer work.

Several members indicated that recruitment for office-holders and volunteers for committees and other SIS activities is most effectively done by direct contact. Also, there was some skepticism about how much survey results in the past had been used to effect changes in TS-SIS activities, *Technical Services Law Librarian* columns, or the creation of educational program ideas.

The timing of the survey also came into question. It has often been taken in the winter/spring time frame. Is that too late to get decent input about the previous summer’s programs? Is it the right time for recruiting for committees that may be in the middle of important work? The timing issue is tied in with the multiple goals of the survey – not every intended result in previous surveys could be best realized by a winter/spring time frame.

Therefore, the Task Force makes the following recommendations:

1. The TS-SIS should distribute simplified surveys seeking general information as to the demographics of its membership and the general sense of the membership about TS-SIS activities at times deemed appropriate by the Executive Board, not necessarily annually.
2. The survey (or an additional, separate survey) should also be used as a vehicle for determining membership views on particular issues, changes in TS-SIS policies, etc.
3. The use of a readily-available and easy-to-use survey system (such as Survey Monkey) should be considered.
4. This survey should not be a call for volunteers. That should be handled separately. The development of the Volunteer Web Form or some other appropriate mechanism should be used instead.
5. Analysis of educational programs and solicitation for future programs should be undertaken by the TS-SIS Education Committee rather than by the general survey.
6. Surveys should be conducted at times when it would be most useful as determined by the Executive Board. The ease of setting up surveys with online survey products should be used to the advantage of the TS-SIS to maintain maximum flexibility.
7. The Membership Committee's role in the survey should be considered insofar as membership issues need to be surveyed, but calls for volunteers and recruitment of TS-SIS officers should be handled separately.

CONNELL Report

*Iris Garcia
St. Thomas University Law Library*

As a recent library school graduate in my first professional position, I was excited yet nervous about attending my first AALL meeting. While I had attended some local and regional conferences, this was much larger and I was unsure of what to expect of a national conference. Even reviewing the program was overwhelming! Fortunately, my supervisor and mentor, Sonia Luna-Lamas, encouraged me to apply for the TS-SIS grant so I could attend the Conference of Newer Law Librarians (CONNELL). I took her advice and was fortunate enough to be chosen as one of the grant recipients.

Before I had even arrived in D.C., I was already corresponding with my host for the Dutch Treat Dinners, Beth Di Felice. I appreciated having dinner plans for my first night in D.C. and the opportunity to meet a few of the CONELL participants before the actual event. We met at the convention center before heading out to a local restaurant and having a delicious dinner along with great conversation. The casual and more intimate atmosphere made it easy to feel comfortable and made thoughts of the next few days less frightening.

On Saturday morning, there was no need to worry about getting lost as there were many volunteers holding signs directing the CONELL participants to the correct room. We were greeted and given the program schedule for the day, and had a continental breakfast waiting for us. We began the morning with a warm welcome from CONELL Committee Chair, Beth Adelman, and an introduction to the AALL Executive Board. The rest of the morning was filled with an array of interesting speakers on varying topics, all presenting ways to become involved in the association, from publishing to submitting proposals and volunteering. It was pleasant to hear how most of the speakers had been positively impacted by attending CONELL years earlier.

At one point, we broke into small groups for an open discussion led by an AALL board member. I was in Janet McKinney's group along with six other CONELL members. This was a wonderful experience as we were able to ask her many questions about her career path and her road to involvement with the Association. While all the group members shared the commonality of working in law libraries, many of us were from different kinds of libraries and had different educational and professional backgrounds.

The mid-morning event entailed visiting the Marketplace, where many representatives of the local and regional chapters, special interest sections (SIS's) and caucuses were available to talk about their groups. It is a great way to learn more about AALL and the many opportunities available to fit your particular professional and social interests. The marketplace is also a fun way to get invitations to other conference events that provide opportunities to meet even more Annual Meeting attendees.

Besides the Marketplace, there were many other networking opportunities at CONELL, such as the Speed Networking session, which is a fun twist on a combination of musical chairs and speed dating. It is an efficient way to meet many of your fellow CONELL members in a short amount of time by spending only a few minutes introducing yourself and a quick chat.

As a new law librarian it is fascinating to find the many things I have in common with others in the profession, and even more interesting to discover the differences! In the afternoon there was even more time to meet fellow CONELL members during the group lunch and bus tour that followed.

Attending CONELL allowed me to meet those individuals who are new to the field and experiencing the conference for the first time as well as some seasoned professionals who were willing to provide guidance and share their experiences with us newcomers. Having this experience prior to the start of the conference undoubtedly helped ease the anxieties of being a first-time attendee, clarified many of my concerns upon arrival, and ultimately made the remaining conference more enjoyable and rewarding. CONELL is a good primer on AALL structure, offers good advice on how to become involved with the Association, and provides an opportunity to meet many other law librarians in a similar stage in their profession.

CONELL Report Ready, Set, Network!

*Beth Given
Notre Dame Law Library*

I am a grateful recipient of a grant from the TS-SIS which enabled me to attend the Conference of Newer Law Librarians (better known as CONELL), and the AALL Annual Meeting in Washington, D.C. this year. I met many people when I attended last year's meeting in Portland who highly recommended CONELL to me, so this year I was thrilled to be able to check it out for myself. If I had to choose one word to describe my experience attending CONELL, it would be energizing! I have highly recommended it, in turn, to many others, and if you are reading this and considering going next year – do not hesitate! My two pieces of advice for potential attendees: be sure to bring business cards (you will meet so many people, it is helpful to have these to exchange) and be ready to have fun!

My CONELL experience began when I met a small group for the “Dutch Treat Dinners” held on Friday night. This provides a great way to enter the full day of events on Saturday, having already been introduced to a few people. Each dinner group is led by a CONELL host. Laura Whitbeck (of Nixon Peabody, LLP) provided my group with a great introduction on what to expect the following day and at the AALL conference overall, as we enjoyed an inexpensive and tasty meal at Full Kee in Chinatown. On Saturday morning, I made my way to the convention center for breakfast and registration, mingling with fellow attendees for about half an hour before the official programming began. The morning events provided a broad introduction to AALL as an organization, including the opportunity to speak with members of the Executive Board, learn about special interest sections, caucuses, mentoring opportunities, AALL publications, and more. Cornell Winston provided one of the morning highlights with candid and humorous words of wisdom on how to get the most out of the conference experience. Another highlight was the Speed Networking session, in which attendees were seated in rows facing each other, with two minutes to get to know the person seated opposite before the rows were mixed up again and the quick introductions repeated with a new person. Although I wish this could have been slightly longer, I did meet many people and was able to chat with them in greater depth at the lunch which immediately followed. After lunch, the concluding event for the day was a bus tour of some neighborhoods in the city, where a guide specializing in the history of D.C. pointed out houses of former presidents, embassies, and more. We ended up with a quick stop in Georgetown, to get off the bus and stretch, and then returned to the convention center for a group picture to cap off the full day.

CONELL is a fun and energizing introduction to AALL for brand-new or semi-new members and, most importantly, provides a great opportunity to network with peers. I found CONELL valuable because it introduced me to a whole new set of people whom I continued to run into during the rest of the week. Just as I had experienced last year when a “First-time attendee” ribbon was affixed to my badge, this year many people noticed my CONELL ribbon and asked how I had enjoyed the experience and how my conference was going. It was great to stop and chat with fellow CONELL attendees throughout the rest of the week, compare conference experiences, and share ideas. All in all, the opportunity to attend CONELL definitely made my overall conference experience in D.C. even richer than my first Annual Meeting in Portland, and I am grateful to have had this opportunity.

This year was my first AALL Annual Meeting and I was very fortunate to receive a TS-SIS grant to attend the 40th annual CONELL session in Washington D.C along with 100 other law librarians. The vast majority came from academic law libraries, but private firms and court libraries were represented as well.

I found CONELL to be excellently planned and organized. After check-in and continental breakfast, the official program started with a welcoming introduction by Beth Adelman, the CONELL Committee chair. She mentioned that at her CONELL many years ago she found only one friend, but their friendship still lasts. Beth introduced her colleagues from the committee, and passed the microphone to the next speaker. I was really surprised to see James Duggan, AALL President, taking the podium. How highly the Association must consider us, its new members, if the President takes time from his busy schedule to meet and greet us! He was not the only one of the Association's leaders to address us, as many Executive Board members were also introduced. Mr. Duggan talked about the importance of being involved in the organization, and being involved does not just mean being a chair or a board member. He also advised us to meet librarians from different libraries and different stages of librarianship, and to talk to people. He shared with us warm memories of his first AALL Annual Meeting and CONELL, when he was still a library school student.

During the next few hours we learned from the officers and the Executive Board members about various opportunities to volunteer and participate in the organization. Thus, Mark Estes, *AALL Spectrum* editor, and Janet Sinder, editor of the *Law Library Journal*, discussed the opportunity for new law librarians to publish in the Association's journals.

Ellen Platt, Mentoring Committee chair, talked about mentoring opportunities and explained the formal and informal mentoring programs. AALL Vice President Catherine Lemann spoke about submitting program proposals to the Annual Meeting Program Committee.

Next on the agenda was a break-out session for getting to know CONELL attendees and members of the AALL Executive Board. All participants were divided into small groups. Every group had a leader. My group had eight people led by AALL Treasurer David Mao, an experienced federal librarian. In this break-out session we got acquainted with each other. We received valuable advice, helpful hints, and were able to ask questions and get comprehensive answers. Moreover, yesterday I received a follow-up email from David in which he invited me to contact him if I had more questions.

During the "From Rookie to Veteran session" Kathie Sullivan provided precious tips for volunteering opportunities, how volunteering can benefit us, and what AALL can offer.

Everything was quite serious until Cornell Wilson took the podium and began his great PowerPoint presentation. The audience laughed out loud! We received a lot of valuable information presented in a delightfully humorous way.

His top things to do at the Annual Meeting were:

- Share your business cards.
- Attend a program outside of your interest.
- Take advantage of the exhibit hall.
- Talk to anyone and everyone.

He not only gave us tips on how to conference, but also taught us how not to conference.

After a short break, the CONELL attendees split into two groups: Marketplace and Speed Networking. Speed Networking was my first and favorite session. Two long rows of chairs were lined up facing each other. We had a two minute conversation with the person facing us and then one of us moved on. I was lucky to sit in the inner row, which did not move. Only our colleagues from the outer row had to change their seats every two minutes. During those short conversations, to my biggest surprise, I met many technical services librarians from the US and Canada. Some of them even hold the same position I do. I was so surprised, because before this session I had met only public services librarians and students. This was a real jumpstart on creating my own professional network.

Marketplace was like a small exhibit hall with information tables set up by a variety of AALL committees, special interest sections, chapters, and caucuses. We collected handouts, goodies, and pens. I started to match faces with names, and met a lot of people with whom I had communicated by email or by phone, and whose names were familiar from different discussion lists.

Overwhelmed with information and impressions, we *newbies* headed for lunch, which was really great. We had another chance to form new professional relationships, and meet more peers and AALL committee members.

The very last part of CONELL was the sightseeing tour of presidential homes. Some of my new friends decided not to take the tour. They incorrectly thought that we were going to see the White House and Mount Vernon. During this tour we did not see classic sights like the White House, the Lincoln Memorial, or the Capitol Building. Instead, our tour guide, Jane North, showed us less familiar city sites. We saw luxury apartment buildings on Connecticut Avenue where William Howard Taft and Dwight D. Eisenhower used to live. We traveled along beautiful Embassy Row. In no other area of the city will you see so many magnificent dwellings. Our bus passed through the narrow streets of Georgetown, and we saw the Tudor Place estate, built by one of Georgetown's founding families. And of course no one can mention Georgetown without recalling the Kennedys. In the 1950's, John F. Kennedy and his wife Jacqueline almost single-handedly turned the neighborhood into the city's most politically fashionable place to live. The tour was terrific!

Unfortunately, CONELL was over. I learned a lot, and I had a lot of fun.

Over the next few days I attended various sessions, educational programs, roundtables, OBS and TS committee meetings, and the exhibit hall. Everywhere I met my fellow new law librarians.

The AALL Annual Meeting was a crucial event for me. It allowed me to stay current in my profession and broadened my knowledge and skill base. I left Washington D.C. energized and full of ideas.

I want to thank TS-SIS for supporting my attendance at CONELL and giving me the registration grant. I also want to thank New York Law School for encouraging me and funding my accommodations and transportation.

Workshop Report

Managing from the Middle: Techniques for Success in Technical Services

*Reported by
Ajaye Bloomstone
Louisiana State University*

As a recipient of an AALL TS-SIS educational grant, I was able to attend the TS-sponsored workshop, "Managing from the Middle: Techniques for Success in Technical Services," presented on 25 July 2009 in Washington, D.C.

The workshop was well organized and flowed smoothly; all presenters were interesting, animated, and easy to follow. This workshop was a joy to attend.

Approximately 35 attendees registered for the workshop, most of whom work in all types of law library technical services departments. There were representatives from non-technical services departments who were able to interject different perspectives during the workshop, which I found to be educational and helpful as I reflect on my daily tasks.

Carol Nicholson (UNC Chapel Hill, program organizer with Karen Douglas) opened the workshop, reiterating its objectives and introducing the speakers. Rick Block (Columbia) was our keynote speaker, introducing and providing an overview for us on "New Horizons for the Middle Manager: An Environmental Scan," defining environmental scanning as a process for "investigating salient economic, social, political, and technological trends and events, potential opportunities or threats implied by those trends and events, and analyzing library operations, resources and services in light of those trends and events." Joe Thomas (Notre Dame) walked us through "Vendor Relations during Hard Times," describing how hard times impact both the library and the vendor. We learned how to figure out what questions we should ask and where we need to begin looking for the answers. Emily Hicks (University of Dayton) led us "Across the Great Divide: Building Bridges for Cross-Generational Management," identifying the four generations of today's library employees, all with divergent perspectives on the world, work, and life; discussion focused on how we can absorb these differences to the advantage of our libraries. Small group exercises were interspersed throughout Emily's presentation, and the exercise sessions were lively, comment-provoking, and fun – all workshop attendees shared many laughs.

Following the lunch break, Filippa Anzalone (Boston College) addressed us on "Advocacy: How to Promote Your Department," after which we participated in a small group exercise on developing and practicing elevator speeches to promote a library's project/asset to someone within the larger organization. Although most topical presentations were one hour in length, two half-hour presentations on delegation were given by Karen Douglas (Duke) as she addressed "Delegation: Work Smarter not Harder," and Alan Keely (Wake Forest) who spoke on "LT to IP: Leveraging Technology to Improve Productivity." These

two sessions dealt respectively with delegation to other individuals in the library followed by information on the delegation of routine tasks via our computers to enhance employee productivity and streamline workflows.

Later afternoon sessions were conducted by Carol Nicholson on “Motivation: Inspiration for Aspirations,” sharing and emphasizing how motivational techniques can both inspire staff and improve workflows to fulfill the myriad of additional responsibilities we have all had to take on, especially during difficult economic times. Yvonne Chandler (Associate Professor, University of North Texas College of Information, Department of Library and Information Sciences) wrapped up the workshop with an animated and lively talk on “Guidelines for Effective Communications,” a session dedicated to understanding and appreciating effective communication and listening techniques since we are all continually involved in interpersonal, intergroup, intragroup, organizational, and external situations.

Included in the notebook of handouts for each session was a comprehensive bibliography which covered all topics. After listening to all speakers, the handouts will be helpful once I return to my library, where I can begin to use what I learned during “Managing from the Middle.”

Workshop Report

Managing from the Middle: Techniques for Success in Technical Services

*Reported by
Jared Wellman
Vermont Law School*

On a hot, humid Saturday in Washington, D.C., I attended the workshop “Managing from the Middle: Techniques for Success in Technical Services.” Before I go into too much detail regarding the workshop, I will make the disclaimer that I am not a manager, having only been a professional librarian for a year and a half. Furthermore, although I am located in technical services, my position as assistant librarian of acquisitions and technology truly encompasses shades of gray among many departments of the library, and within various other departments of the law school. I serve as a facilitator, constantly managing projects and negotiating the individual egos of a variety of people, from department directors to faculty to ordinary staff. That being said, I wanted to attend the class to enhance my management skills for two reasons:

1. The recent retirement of a librarian has created a vacuum in the technical services department which is unlikely to be filled anytime soon. As the only librarian (three non-MLS staff members also work in the department), I am often looked upon to answer questions and address issues. This has naturally led me to believe that I might best serve my library by taking on more responsibilities in the department; whether or not officially.
2. The other reason is that I know I will be a manager one day, whether it is in a new position at my current school or at another institution. I did not enter into this profession without the idea of upward mobility to some degree and it is never too early in one’s career to enhance those skills.

I raise the above issues because they influenced my view of the class, as opposed to a fellow attendee who may already be a manager. I truly enjoyed the class and learned, or at least confirmed, some trends in technical services in general, and management in particular. The library as a physical location is changing rapidly. Our collections are changing rapidly. And increasingly, at least in my view, what it means to be a librarian is changing rapidly.

The class began by talking about some of these changes. Rick Block (Columbia University) discussed how they impact our understanding of cataloging. With current practices based on a print heritage, we may need to look outside the library for plans when going forward. This rapid change means the rules we have become accustomed to are widely being replaced with wildcard solutions. This does not mean that technical services is vanishing, but rather that we need to find new goals. There is an increased emphasis on digitalization, preservation, and improving storage, retrieval, and curation of digital content services. Librarians will need to focus more on those items which make library collections unique, and can be published and supported in digital archives or institutional repositories. During a discussion led by Filippa Anzalone (Boston College), we learned that several of the libraries represented at the workshop were retraining catalogers to become institutional repository managers, because shelf-ready services had reduced the amount of original cataloging required of certain librarians. It is this vision of finding a need or filling a void that is becoming necessary for all technical services librarians.

Perhaps my interest as a new member of the profession lies with looking toward future trends because that is where the bulk of my career still awaits. But the workshop spent a good deal of time discussing a variety of issues including vendor relations during economic hard times, cross-generational management, advocacy for the library or your department, delegation of work to people and machines, and motivation of and communication with staff.

I found all the presenters well prepared and some downright entertaining. For example, I was excited and inspired after hearing Filippa Anzalone's presentation on advocacy for your department, because I found her enthusiasm infectious. It was only afterward that we learned she did not feel well that day, and I was all the more impressed with her dedication and character. Also, during Emily Hicks' (University of Dayton) presentation on cross-generational management I was delighted to learn that I, apparently, am a fish out of water generationally speaking. As a person on the tail end of GenX and the cusp of GenY, I am a hodgepodge of generational traits. Of course, we are all aware that there will soon be seismic shifts in the workplace as the baby boomers begin to retire in increasing numbers, while being replaced by more and more GenY-ers. But I couldn't help but wryly wonder what the library will look like when my generation is finally succeeded by some future generation, who have anxiously been awaiting my retirement to start making their own changes to the profession.

I cannot possibly address all of the topics covered in detail, but I believe one of the most important topics discussed was during the final section on effective communications, led by Dr. Yvonne Chandler (University of North Texas). The key point was the importance of *listening* in communication. Dr. Chandler pointed out that we spend the majority of our time listening versus other forms of communication (reading, writing, and speaking). This means that the most important thing a manager, indeed a human being, can do is learn to listen well. Dr. Chandler's emphasis on listening resonated with me, but I am also well aware that good listening is a skill that requires years of patient cultivation.

I am glad I attended this workshop because it made me think about the type of manager I want to become and the skills I will need to do so. I enjoyed my time during this workshop, and believe I have started down a long road to a successful career as a middle manager.

Program Report

AALL Keynote Address by Jonathan Zittrain

*Reported by
Brian Striman
U. of Nebraska Schmid Law Library*

The room was full. The room was huge. As you walked in, the first thing you noticed were two gigantic screens on both sides of the stage, with an animation show entitled, "We-Think: What It's About," by Charles Leadbeater, <http://charlesleadbeater.net>. A variety of images scroll across the screens with statements and questions: "How do we know what's private? —How do we protect what's private? —Everyone is talking. —The web is mass conversations. —Because new ideas come from conversation. —In the past it was what you owned; now it's what you share. —It's like a bird's nest where everyone leaves their little piece." There were many more of these little *think* sentences and questions.

James Duggan stepped up to the podium first, and after some AALL information, some thank you's, and a nice introduction, keynote speaker Jonathan Zittrain took the stage. For more information about the speaker see http://en.wikipedia.org/wiki/Jonathan_Zittrain.

Jonathan Zittrain expressed hope that his presentation would mash together the future of the Internet and the future of the library.

He said that when he thinks of the word *library* as a noun, he imagines a fortress protecting the crown jewels (books) against the forces that might want to steal them. Inside the fortress were the custodians of knowledge, where only specially-qualified people (librarians) could manage and protect the jewels. He asked if anyone knew the percentage of materials in this fortress that would actually ever be used, and someone responded about five percent. He imagines these materials as boxes upon boxes of soda crackers stored up in a fallout shelter, and thinks that the Potemkin village analogy may be pretty accurate (see http://en.wikipedia.org/wiki/Potemkin_village). The cost of housing these materials is high, especially since such a huge percentage are seldom if ever used, and we have been losing control of what we own and what we purchase.

When Zittrain thinks of the word *library* as a verb, he conjures up an image of "Jeeves" on the website "Ask Jeeves"—and he mentioned the weird tension between the librarian and the means by which users search electronically. He talked about new corporate strategies that are farming out all sorts of new ways to harvest information, many quite inventive and devious. As a result, companies no longer need to hire and keep, say, research and development divisions. Nowadays, companies can cast nets to people they don't even know and pay them money for useful ideas. He mentioned LiveOps, Wikinomics, and We-Think. In this cast-the-nets-and-pay-as-you-go model, companies can instantly "terminate" people who aren't performing.

He said that when we think of the word *library* as an adjective, we might think of it as having a certain value. He showed some slides of various institutional “Core Statements” and noted the confusion within and among them, some of them not even making sense. Several of the core statements drew chuckles from the audience. He found AALL’s mission statement on its website, and then he broke it down into a few words: “society, central to, fair, educate, equitable and authentic,” and said these are really good words for librarians.

Zittrain moved on to the topics of ethics, privacy and group policing. Where information is coursing around the Internet, we don’t always know the people who may be implicated by a piece of data. The goal is not to regulate data on the Internet, but to allow a kind of *responsibility of the herd* concept. As an example, he then asked for those present to hum their approval for a few scenarios he posed. First he asked if anyone in the audience would forward a piece of data which could harm the person named, or a photo depicting a person in a negative or damaging way, and the room was silent. Then he asked the audience to hum if they would forward Dick Cheney’s memo about the CIA and torture, and the audience hummed so loudly that it sounded like the inside of a beehive. His point was that he sees the set of self-controlled values of a populace as being the agent that ensures authentication and judicious dissemination. He sees the possibility of the collective action of the good. He finds patterns of good action by the populace in his brainchild, the Herdict Project, <http://cyber.law.harvard.edu/events/luncheon/2009/02/herdict>.

Zittrain then spoke of the way Wikipedia works, and compared it to a house on fire where there are no paid full-time firefighters, but where everyone in the neighborhood sees the house smoking almost instantly and rushes in seconds to help put it out. He mentioned Wikipedia’s administrators’ problems pages, and noted that Wikipedia is just 45 minutes away from destruction at any given moment, but that in seconds the Wikipedia counter-vandalism unit kicks in.

Another example of rules and values comes from a Dutch traffic engineer who decided to remove the signage at a busy intersection to see what would happen. To his delight, the statistics over time showed fewer accidents. This may well be due to a human trait: where there is freedom from rules, people take more responsibility for their actions.

Zittrain sees concept opportunities that can just *happen* if someone simply takes the initiative. One example is open course sharing, where students collect syllabi and offer course notes from students who’ve taken a class. Another example is the Waybackmachine. Its inventor saw the need and importance of archiving online documents, and then JUST DID IT. We can just DO THINGS. (On the other hand, anyone can instantly opt out of their commitment.) The Internet is the biggest copyright infringer ever. Google Books just started scanning books in spite of copyright problems. Other examples of valuable web initiatives include LII (Legal Information Institute), Project Gutenberg, and The Open Library at <http://openlibrary.org>. Sign the petition urging PACER to offer its services to libraries for free. We can change the dynamic whenever we want—by just doing it!

Zittrain spoke about the possibility for an open source citation system. He argued that if law librarians don’t create it, some dot-com will, and charge money for it. He proposed changing the model of the printed bound casebook to a model in which casebooks wouldn’t need to be produced by a single author or two; anyone or any group would be able to just produce one on the web. Collaboration software can be adapted for a variety of legal education purposes. Consumers can come up with concepts that would force vendors to open up their holds on data access.

What most impressed Zittrain about his experience in libraries is the face-to-face relationship with a professional librarian, where we have an actual human impact with our patrons. He said that it boils down to the sense of stewarding things for the future; that we need to make data encyclopedic. The main guideline on the web now is: Release early—Release often. He raised some questions for the audience to ponder: There are other cultures with other values. How does this affect group policing? Can we produce/create a kind of value-neutral model, where we offer the various values to the finders and they get to pick whichever value entities they want?

Zittrain concluded his remarks by saying, “See you on Facebook.” For more information about his book, *The Future of the Library and How To Stop It*, see <http://futureoftheinternet.org/>.

Editor’s note: Brian posted his review of Jonathan Zittrain’s keynote address as “2009 Keynote Comments” on the AALL Spectrum blog, July 28, 2009, <http://aallspectrum.wordpress.com/2009/07/>.

What better place to attend training in the use of *Cataloger's Desktop* than on-site at the Library of Congress (LC)? After all, it is the organization responsible for giving us this essential tool. And who better to deliver the training than Bruce Johnson, product manager? Talk about going right to the source! I know there was no place I would rather have been on the morning of July 29, 2009. In addition to thanking LC, I want to thank OBS for sponsoring this wonderful opportunity and Karen Selden for organizing it, along with the *Classification Web Training*.

Mr. Johnson titled the first part of his presentation "Fine Tuning *Cataloger's Desktop*: Tips for Making These Tools Your Own!" The tips and the accompanying demo were very helpful. What is *Cataloger's Desktop*? It is a web-accessible, fee-for-service subscription product for catalogers that can be accessed 24 hours a day, seven days a week, and provides the most widely-used cataloging documentation resources in an integrated, online system. It contained 279 resources the day of the training, but that number is constantly increasing so it may be higher by the time you read this. It is updated quarterly and a free thirty-day trial is available for non-subscribers to test drive it.

The wealth of cataloging resources available in *Cataloger's Desktop* can be a negative at times. Talk about information overload! The key to managing this is to click on the Preferences tab and check the boxes next to the resources you will consult most frequently. These settings are saved and attached to your email address, so you can apply them anywhere you search *Cataloger's Desktop*. Clicking on Categories under the Browse tab helps to further narrow the resources to be searched and it is simple to revert to the entire list of resources at any time (Reset/Use Full Site).

Random tips that stuck with me:

- Control/F brings up the Find box, which is also always available in upper right corner
- Search Tips & Search History link in Find box is useful
- Hits are arranged by order within the resource, not by relevancy
- In the Words Around Hits option, choosing the Short radio button reorders hits in context
- Phrase searches must utilize quotation marks
- All reference links in the hierarchy at the top of the results pane on the right are hot links that can be clicked on

"*Cataloger's Desktop 3.0: The Next Generation: A First Look*" was Mr. Johnson's title for the second part of this session. This new version is due to be released on November 1, 2009. The technology running the current product is maxed out. Mr. Johnson mentioned more than once that the 3.0 version will be noticeably faster, a fact that has been verified by the 45 testers of 3.0 at LC and elsewhere. The interface will have a cleaner look and preferences will be enhanced. Searching will be updated to allow for fuzzy matching and the ability to capitalize on your previous search behavior. Resources that are commonly known by acronyms will be easier to locate in the long alphabetical list since those acronyms will appear at the start of the title.

New features include:

- Subscriber-customizable interface
- Incorporation of RSS feeds to stay current
- Persistent URLs to facilitate linking
- Drag and drop shortcuts to your computer's desktop
- Federated searching of database resources like the LC catalog

Yet Mr. Johnson assured us that we will not lose what we are used to! As a jaded veteran used to dealing with ILS (integrated library system) vendors who never seem to make the changes we really want, I find it refreshing to interact with LC (and specifically, Mr. Johnson) in its role as the vendor that provides access to *Cataloger's Desktop*. It is obvious that LC values the feedback of catalogers using this product, because such feedback often finds its way into *Desktop*—and very quickly at times. Mr. Johnson invited all in attendance to contribute our ideas to LC. This open solicitation of suggestions for improvements appears in many other venues as well. LC's responsiveness to the needs of catalogers is especially important as we face the Fall 2010 implementation of *RDA (Resource Description & Access)* which is designed for optimal use in electronic format.

I have been using *Cataloger's Desktop* for close to five years now. Why did I attend this training session? Because I had never had the chance to attend any training like this before. Whenever I am stumbling around in *Desktop*, I wonder why

I can never seem to carve out the time to teach myself. Also I am a member of the boomer generation and prefer to be *formally* trained when possible. Even the smallest little bit of advice that stays with me justifies my time investment. Not to mention the fact that I was there in DC for the AALL conference and the training was free. All signs were pointing in the right direction! I have already instituted some of the tips from this session, thereby improving my ability to use *Cataloger's Desktop* more efficiently and effectively.

Handouts URLs: <http://www.aallnet.org/sis/obssis/meetings/2009/LCtraining.htm>

Information (including FAQs): <http://www.loc.gov/cds/desktop>

Free Trial: <http://www.loc.gov/cds/desktop/OrderForm.html>

Logon Access for Subscribers: <http://desktop.loc.gov/>

Program Report

Cataloging Video Recordings: AACR2 Chapter 7

Reported by
Georgia Briscoe
University of Colorado Law Library

Speaker: Richard Paone (Dickinson School of Law, Pennsylvania State University)

This very informative and well-organized program benefited only ten attendees because it was scheduled against another Technical Services SIS program (“Taking the Aggravation Out of Aggregators: An Update on Aggregator-Neutral Bibliographic Records”) which had 150 attendees. However, the good news is that anyone will greatly benefit from the 62 excellent PowerPoint slides Richard created, available at <http://www.aallnet.org/sis/tssis/annualmeeting/2009/handouts/catalogingvideos-paone-handout.pdf>.

The presentation assumes the user has a basic knowledge of AACR2, MARC, and visual materials. It shows how the basic rule “Enter a motion picture under title” established by AACR1 is continued with AACR2 since videos are usually of mixed responsibility. Special rules when cataloging videos using MARC are: Always use the GMD |h [videorecording], and know where to find sources of information (title frame first, then container, etc.).

Other special considerations for videos are: justification for creating a new MARC record (well clarified, even down to when NOT to create a new record), how to treat multiple publishers and distributors, how to describe the many physical formats (DVD, VHS, Beta, Umatic) and how to distinguish various television encoding systems (NTSC, PAL, SECAM). Richard recommends erring on the side of editing existing records to reflect the many different DVDs or other videodiscs now available. His slides detail how to handle letterboxed (widescreen) versions (250 field with aspect ratios), closed captioning vs. subtitles (546 and 655 fields) and summary notes (520 field).

About half the slides show how to catalog television programs, with excellent examples of MARC records. One interesting instruction was, “Don’t make added entries for persons if there is a production company with an added entry, unless the person’s contributions are significant.”

Catalogers can use Richard Paone’s slides to become pros at cataloging videorecordings. Consult the bibliography in the last slide for further information. And next year at AALL, let’s hope programs of interest for technical services librarians are not scheduled against each other.

Program Report

Classification Web Training at the Library of Congress

Reported by
Joni L. Cassidy
Cassidy Cataloguing Services, Inc

Lecturer: Patricia Hayward, Classification Product Manager, Library of Congress

When using *Classification Web*, it is best to use the **Enhanced Classification Browser** feature because it does automatic table calculations for you. The exception seems to be when a class number is constructed partly by geographic subdivision. This cannot be built *by machine* if part of the number comes from a Table (e.g., state numbers).

Use the **Bookmark** feature to limit the schedules searched when you're working. For instance, limit your searches to the "**K**" schedules if you only want to consider classification numbers in that range.

Ms. Hayward pointed out that there are some **parallel structures specific to the "K" schedules**. Here are two examples: 1) KZA3481 for Marine law, which also has a class number in K (Comparative law); and 2) KBP75.3 for The Koran, which also is classed at BP100+ (Religion). If you see < > around a number, it means that the Library of Congress isn't using that number.

Your search may return a screen with any of the following letters (choices) displayed:

- H** = Display LC Classification Hierarchy
- R** = Display Authority Records for this Number
- B** = Display Bibliographic Records for this Number from Selected Catalogs
- L** = Display LC Subjects for this Number
- D** = Display Dewey Numbers
- S** = Display LC Class Number & LC Subject [1st 6XX heading]
- N** = Edit Local Notes for this Record

For **LC Subject Headings** searches, Ms. Hayward recommended using the **LC Subjects & LC Classification** interface. She also noted that there is a separate **Genre/Form Heading** search interface. The **User Group** prompt links to a discussion list for announcements, corrections, etc.

Possible improvements being considered by the Library of Congress include correlations between LC/NLM/DDC classifications and LC/MeSH subjects, and correlations from class numbers to name authority records.

Program Report

Here Today, Gone Tomorrow? The Future of Print Periodicals in Law Libraries

*Reported by
Emily Phillips
WilmerHale*

Librarians today face many changes with the development of electronic services such as HeinOnline. Libraries are frequently able to offer access to patrons in multiple formats. The future of print periodicals in law libraries is uncertain. With shrinking budgets and limited space, librarians are looking for ways to maintain access to information at reduced costs. This session discussed the advantages and difficulties of replacing print periodicals with online access. The panel for the discussion consisted of Richard Spinelli (William S. Hein), Adeen Postar (Deputy Director, Pence Law Library), Katrina Piechnik (Systems Manager, Jenkins Law Library), and Paula Tejada (Associate Law Librarian, Charleston School of Law). Ann B. Kolodzey (Acquisitions/Collection Development Librarian, Widener University School of Law) served as moderator. The panel addressed collection development policies, technical services workflow, binding, weeding, off-site storage and patron access in the advent of online periodicals.

Adeen Postar may have given the best prediction about the future of print periodicals in law libraries as "short and sweet." According to Postar, Pence Law Library is slowly moving away from print periodicals for a number of reasons, including students' preference for online access, lower bindery cost and more shelf space. Some libraries have made the decision to no longer bind volumes of law journals that are available on HeinOnline. Pence Law Library is considering using the electronic version as the archival version of a law journal, but at this time it is still keeping the print version. Some of the difficulties in providing access electronically are staff time required for updating the OPAC records, user training, and outreach.

Charleston School of Law (CSL) is an example of a law library that has a mostly electronic collection. CSL has a total of 1800 linear feet of shelving for print periodicals. It was the intention from the foundation of the school to have a mostly electronic collection and the collection development policy was created with that in mind. The Information Assets Policy states that the preferred format for the collection will be electronic; if an electronic version is not available, then the print format will be purchased. The library does maintain duplicate subscriptions (print and online) to selected law reviews. The retention policy for the law reviews is to discard the print once an issue is available via HeinOnline, thus allowing the library to remain within its limited space while still providing access to information. The library received positive feedback from the ABA for the level of training and outreach provided to students and faculty. Going forward, the library will continue to review its Information Assets Policy to ensure that it stays current with changing technologies, and will continue to reduce the number of subscriptions maintained in both print and electronic format.

Jenkins Law Library took the approach to try to balance between print and online access to periodicals. Jenkins serves a wide range of users so it is difficult to meet the needs of all of them. According to Katrina Piechnik, from 2005-2009 the library lost three full-time librarians and six part-time employees. With fewer staff and an increase in workload, the library staff searched for ways to meet the needs of the 21st century patron. They began by moving less-used print materials to a remote part of the building and increasing the public space. They decided to discard pre-1980 print periodicals that are available via HeinOnline with the exception of some law reviews. Currently the library limits print periodical retention to five years due to space limitations. Ms. Piechnik pointed out that it is important to have clear records in the OPAC so that patrons and staff are able to understand what is available electronically versus in print. She also observed that more work is shifting to professional librarians rather than to paraprofessionals, because of the level of in-depth knowledge that is needed to maintain electronic records. Jenkins Law Library is still working to find the best ways to meet the needs of its users, but accessing periodicals electronically will be part of the solution.

Richard Spinelli gave some staggering statistics on print periodical cancellations. In a recent survey of HeinOnline subscribers about half stated that they have cancelled print subscriptions because the materials are available on HeinOnline. Furthermore, 70 percent have cancelled because of budget cuts even when the materials are not available on HeinOnline. Many of the major law reviews have also experienced a decline in paid subscriptions over the past 25 years. Spinelli predicts that the current trend of law libraries keeping only the last five to ten years of periodicals in print format is likely to continue as more and more periodicals are added to HeinOnline.

Program Report

Here's to Your (Digital Archive's) Good Health! Auditing and Evaluating Digital Preservation Projects

*Reported by
Mary Jo Lazun
Maryland State Law Library*

In recent years, libraries have established digital repositories for journals, online publications, faculty papers, and more—just about anything that is born digital. Managing these collections is challenging, expensive, and time consuming. Given the investment of time and money, how can a library know with reasonable certainty that the repository will exist in ten, twenty, or even fifty years? In the United States, the Trustworthy Repositories Audit & Certification (TRAC) criteria are becoming the standard that libraries use to determine whether their collections can be deemed “trustworthy.” Representatives from three digital repositories discussed the value of auditing digital repositories and their experiences with conducting a “TRAC audit.”

Major Points:

- Audits work best when they are tailored to meet the goals of the institution.
- Audit tools will always lag behind technology.
- Audits tend to focus on inputs, not outputs.

Dr. Bruce I. Ambacher, Visiting Professor, University of Maryland, College of Information Studies

Dr. Ambacher began by providing some historical context for the evaluation of digital repositories. He reviewed studies that predicted born digital materials would probably be unavailable to future researchers, and expressed a lack of confidence in the ability of libraries to continue making digital materials available. Dr. Ambacher noted that prior to the advent of digital publications, prospective donors could easily evaluate an institution to determine whether it was the best place to house a collection through site visits, conversations with staff, and reviews of the institution's budget. In the digital archive world, however, this task is more challenging. A visit to a *server farm* is not the same as visiting a special collections room. It is very hard for a person, or an institution, to know with any certainty if the repository is trustworthy.

Dr. Ambacher then provided an overview of the Open Archival Information System (OAIS). OAIS was the initial step taken by archivists to develop a framework for comparing different long-term preservation strategies and techniques. OAIS was used to help develop the framework for audit tools of digital archives including the TRAC criteria. TRAC is a comprehensive tool that institutions use to help determine whether digital collections are being handled in a competent way. TRAC has three major areas of focus: organizational infrastructure, digital object management, and technology infrastructure.

Eileen Fenton, Executive Director, Portico

Portico is a nonprofit organization whose mission is to preserve scholarly literature published in electronic form, and one of the first repositories to go through a TRAC audit. To date, publishers and scholarly societies have placed 12,000 journals into Portico's digital repositories for permanent digital preservation.

The TRAC audit was conducted shortly after Portico added materials to its digital repository. Because Portico was then a brand new organization, its staff saw TRAC as a way to build greatly needed trust and to foster transparency in their repository. Ms. Fenton said that while the staff found the scope of the TRAC audit to be challenging, the audit did confirm that Portico's approach to digital preservation was solid, and the audit praised its content control mechanism. While the audit noted that the system documentation was incomplete, this finding was not surprising as the organization was still in the process of developing its procedures.

Having gone through a TRAC audit, Ms. Fenton believes that they can be a useful way for an organization to evaluate the fit between its obligations and its operations and resources. Audits like TRAC can also be used to determine whether best practices are being followed. Audits can also provide institutions with detailed technical assessments that may be beyond the skills, inclination, or time available to their staffs. However, audits are admittedly imperfect; they cannot, for example, answer critical questions such as, "Will this journal be available when a library needs it in 2025?" "Is this the 'right' or 'best' solution?" "How far should I trust (and pay to support) this effort?"

Ms. Fenton concluded by offering a number of critiques and recommendations. She noted that audit results tend to be pass/fail; a more nuanced approach, such as a simple rating system (good, better, best) may yield more helpful results. Audits, by their nature, tend to be very broad, whereas sometimes a deep and detailed look at a particular area provides better information. Finally, the current "one size fits all" standard does not take into account the potential need for distinct audit criteria for institutions with widely different missions, for example a data center or a publication archive.

Victoria Reich, Director, LOCKSS Program, Stanford University Libraries

Ms. Reich began her presentation with an overview of the LOCKSS (Lots of Copies Keeps Stuff Safe) Program. LOCKSS is an open-source software platform that creates digital rather than physical stacks of materials. In the United States, over 115 libraries have installed *LOCKSS boxes* for their digital collections.

Ms Reich offered a provocative observation: although librarians tend to focus on file migration as the key threat to digital archives, the most likely source of failure is not technical but structural. Most archives and repositories, in other words, fail because of institutional neglect or failure. She stressed that although technical issues such as file migration are important, it is arguably more important for audits to focus on institutional vitality rather than on documentation or migration policies.

Ms. Reich briefly contrasted TRAC to DRAMBORA (Digital Repository Audit Method Based on Risk Assessment). She favors the risk assessment focus of DRAMBORA rather than the evidence-based focus of TRAC. According to Ms. Reich, the major problem with audits, TRAC in particular, is that they concentrate on inputs. Since the goal of a digital repository is to keep items so they can be used later, auditing tools should focus on the viability of actual system outputs. Audits will likely always lag behind the technology, and although audits may appear to be rigid in their construction there is no reason they cannot be modified to meet the auditing goals of an individual institution.

Sarah J. Rhodes, Georgetown University Law Library

Ms. Rhodes introduced the audience to the Chesapeake Project, a joint effort of Georgetown University Law Library and the state law libraries of Maryland and Virginia to establish a collaborative digital archive for the preservation of web-based legal materials. The Chesapeake Project recently finished its two-year pilot. OCLC hosts the Chesapeake Project's repository on its proprietary CONTENTdm platform. Copies of harvested items are preserved in a "dark" archive and are available directly from CONTENTdm via WorldCat, the catalog of each library, and Google.

As the pilot project neared its completion, the project staff enlisted the Center for Research Libraries (CRL) to conduct an independent audit based on the TRAC criteria. The audit was tailored to meet the needs of the project and its budget. The audit report noted that the Chesapeake Project provides good stewardship with a "cost-effective and focused approach" and "its decision- and policymaking apparatus is relatively lean and structured in a way that should ensure the archives' responsiveness to the law library community." The report also identified a few areas of risks including the reliance on bit preservation and the system's limitations with regard to handling dynamic content.

The Chesapeake Project staff also conducted a self-assessment after the project's first and second years. The self-evaluation looked at the number of items harvested, usage statistics, and the number of materials no longer available on the web. One of the most interesting findings was that in just two years, one in seven harvested items were no longer available from their original URLs. This finding confirmed the need to preserve digital legal materials that have been posted on the web.

As previously noted by other panelists, libraries that wish to audit their digital repositories should feel free to tailor an audit to meet the project's unique mission. Institutions considering whether to undergo an audit should maintain thorough

documentation. For example, the Chesapeake Project staff found an independent, third-party assessment to be a worthy investment. Such audits can be especially helpful in identifying the risks associated with off-site vendor systems. Ms. Reich stressed that because digital repository technology is rapidly evolving, inconsistencies in what can and cannot be measured are likely to occur.

Program Report

Latest Trends in Library Automation: Building Creative and Inspiring Discovery Platforms

*Reported by
Michael Maben
Indiana University Law Library*

Presenters: Georgia Briscoe, University of Colorado, William A. Wise Law Library (coordinator and co-moderator); Filippa Marullo Anzalone, Boston College Law Library (co-moderator); Marshall Breeding, Vanderbilt University, Jean and Alexander Heard Library (speaker).

Marshall Breeding is Director for Innovative Technology and Research at Vanderbilt University Library in Nashville, Tennessee, and he was chosen to be the Academic Law Libraries Special Interest Section VIP for the Annual Meeting in Washington, D.C. With ALL-SIS's co-sponsorship, OBS presented this AMPC-accepted program featuring Breeding and his views on the latest trends in library automation. Breeding is well-suited for this topic — he remarked in his opening that this is his niche, having focused on the business of library automation (and in particular the international perspective) for many years. His lib-web-cats database at <http://www.librarytechnology.org/libwebcats> is probably the most comprehensive guide/directory of library websites and catalogs in the world. He also has been the *Library Journal* columnist for “Automation Systems Marketplace” since 2002, and he writes a monthly column for *Computers in Libraries*.

Breeding's talk was one of wide-ranging views and trends in library automation, with a particular emphasis on law libraries. He clearly had done his homework, working with his database to analyze specifically law library trends. He discussed current directions in the implementation of automation in law libraries, with the caveat that data for law firm libraries is hard to gather. He also analyzed the characteristics of law libraries and how they differ from other libraries — characteristics which include sophisticated clientele, the high cost of errors or omissions, complex collections, serials more prominent than monographs, and more. These are all issues with which we are familiar, but it was interesting to see someone outside the law library community recognize them.

The talk then focused on the latest trends in the library automation arena more generally. He pointed out that the industry is in a major period of upheaval, with consolidation and transitions occurring while new open source products and companies are entering the market. At the same time traditional OPACs and conventional ILS systems are declining in popularity, while new discovery interfaces and content management systems are emerging. This relates to Web 2.0 implementation, which he said was being accomplished ad hoc in most libraries.

From this point on, Breeding concentrated on three trends: open source (“The Mandate for Openness”), new discovery interfaces (“A New Generation of Discovery Interfaces for Library Collections”), and new products (“New Generation Library Interfaces”). According to Breeding open source is generating wide interest and shaking up the whole market. He noted that it is being seen as a viable option to traditional commercial software, but that law libraries are less involved in open source than other types of libraries. Much of this interest is due to disillusionment with current vendors and systems. Breeding believes that this competition will force established vendors to provide more innovation and more open source capabilities with their systems.

In the latter portion of his talk, Breeding discussed trends in new discovery interfaces and new products for library collections. He highlighted non-library web information providers that are used for library purposes by patrons, including Google, Amazon, and Wikipedia. These commercial products represent what people are expecting, which is causing traditional OPACs and library systems to experience declines in use. Libraries are looking for alternatives with modern discovery layers and tools. Several such new discovery products for libraries are already available. The first trend in this area was products that concentrated on technology, such as AquaBrowser, Endeca, and VUfind. Now the trend is to have pre-populated indexes delivering web-scale discovery, such as WorldCat Local (OCLC), Summon (Serials Solutions), and NELLCO's Universal Search Solution (USS) project. Breeding contends that OCLC's expansion of WorldCat Local into circulation, delivery, acquisitions, and license management represents the latest trend towards a cloud-based computing model.

Breeding closed his talk by observing that this new phase of library automation, with a number of vendor-free possibilities, will lead to better choices for libraries. But he cautioned that we need to ask ourselves if we are comfortable giving up control of our data if we go with the cloud-based model. We must recognize the risks along with the benefits.

Program Report

Making Your ILS Web 2.0 Happy

*Reported by
Richard Todd
Mabee Legal Information Center
University of Tulsa*

Tina Ching (Seattle University School of Law) began the session by outlining some of the key goals of the next generation of OPAC systems pertaining to their interaction with the current (and future) Web 2.0 environment. Some of the desired capabilities include: suggested search, spell checking, faceted browsing, syndication feeds, user content, and book reviews/recommendations. Ching considers it essential to expand beyond books to article level records, in order to address rising patron expectations based on features and content they are accustomed to accessing on the web. Among features already being broadly implemented are book cover images and persistent URLs (PURLs). Ching demonstrated the Seattle University School of Law website, highlighting the Research Guide page and integrated Google Preview buttons. She concluded with a brief discussion of MAJAX—Millenium AJAX, a product that helps integrate tools into Millennium ILS systems.

Doug Ericksen (Seattle University, A.A. Lemieux Library) spoke next. He focused on the technical tips, tools and challenges related to Web 2.0 integration. He stressed the importance of a web browser's ability to support Java script and added that most now do. He briefly addressed the pros and cons of two different approaches he labeled as *Expensive Solution* and *Cheap Solution*. The *Expensive Solution* entails purchasing out-of-the-box products while the *Cheap Solution* employs client-side scripting. One technical challenge he encounters is that the bibliographic data displayed on system-generated pages does not lend itself well to style manipulation. Doug's project made use of several tools, including harvester.js, manipulator.js and Google Books viewer. He demonstrated how Google Books viewer substitutes a *lightbox* at the top of the page, thus eliminating the need for a pop-up window.

The final presenter was Tony Chan (Quarles and Brady LLP) whose presentation was entitled, "MS SharePoint & ILS." He described SharePoint as a work collaboration and content management system composed of two products: WSS (Windows SharePoint Services) and MOSS (Microsoft Office SharePoint Server). WSS serves as the backbone of SharePoint, while MOSS serves as a workflow management and reporting application. Also included are the search platform MSS (Microsoft Search Server) and MOSD (Microsoft Office SharePoint Designer), a website creation and management tool. Tony gave a detailed description of how he applied these tools in a law firm setting in order to integrate access to documents and web resources through their SydneyPlus ILS. He finished with a live demonstration of the site, showing newsfeeds, blogs, and more via a simple, clear menu within a customized tab environment.

I liked the way this program gave a sort of in-progress peek at our (near) future ILS systems in both academic and law firm settings. In both examples the audience got a good look at applications being implemented now, applications still in the works, and applications that will be needed in the foreseeable future. The *next generation* integrated library systems won't arrive at our institutions as neatly packaged, finished products. They will, like Web 2.0, arise from, and remain in, a continual state of evolution.

Program Report

MarcEdit: A Magic Wand for MARC Records

*Reported by
Matthew R. Jenks
Franklin Pierce Law Center*

Interoperability. Extensibility. Flexibility. Global editing. Swapping data. These were just some of the features on display during the afternoon program which took place at the Washington D.C. Convention Center on July 26th in Room 152 A&B, called "MarcEdit: a Magic Wand for MARC Records." Considering the session's focus on one application and the potential complexity involved, the program was very popular and very well-attended, with 80+ librarians and information professionals in the audience.

The session was presented appropriately in lecture format with accompanying media, and was given by Terry Reese, author of the MarcEdit program and Digital Production Unit Head at Oregon State University, with Clara Liao (Georgetown University) assisting and providing the opening introduction. Despite the format the program was never boring or tedious. The MarcEdit application itself is so full of surprises and new utilities at every turn that we were all waiting to see what the next few minutes would reveal.

Terry began with a short history of the MarcEdit program, and related how he began in 2000 by creating a program which would be able to run a clean-up utility on a large database of Marcive records with invalid call numbers. In the end he was

successful, and over 45,000 records were corrected in a matter of hours, using what is probably one of the first post-DOS-based clean-up programs, created just to tackle this one project!

Obviously, the rest is history, as Terry's colleague Kyle Banerjee encouraged him to make the MarcEdit program (after it was honed and refined) widely and freely available as a download to library and information professionals in general. The fact that it became so successful is a testament to the fact that MarcEdit fulfilled a need in the world of information professionals which heretofore had been completely unmet. The fact that it is still so successful is a testament to Terry Reese and his recognition of the changing needs and realities in the information world, which he is continually updating MarcEdit to meet.

MarcEdit was written in C Sharp program language, giving it the flexibility needed for its purpose. The program uses marc xml as the control language as well, further increasing its flexibility and interoperability. Though MarcEdit can be used for numerous purposes, Terry clarified that its primary purpose for librarians lay in batch processing, updating large groups of records, and identifying and correcting *bad* records, including those produced in MARC format. In the interest of time, he noted that the current session would be primarily used to address editing and updating vendor records, particularly those of the MARC persuasion. This was also designed to appeal directly to catalogers, who in theory, at least, made up the majority of attendees.

Terry then showcased MarcEdit's features with some live demonstrations, giving us all a clear view into the various ways one might use MarcEdit for any number of tasks. Using a sample MARC record, he loaded it into the first feature of the program, called MarcBreaker. This utility *broke* a complete MARC record (which in its organic form is not very readable) down into mnemonic code, which could then be loaded into the MARC Editor and converted into a completely cross-functional, interoperable, and flexible data set. This data set not only enabled mass updates of large sets of MARC (vendor) records; it also enabled the operator to identify *bad* MARC record sets, or MARC records which, for whatever reason, were structurally invalid. Going one better, it could then correct those bad records, and repopulate them into the original source file. Terry designed the MARC Editor to function much like NotePad in Windows, except that in MARC Editor the data loads in Unicode, which is structured to create mnemonic character sets, allowing the data to still be read coherently as a functional MARC record.

Some of the features of the MarcEdit program which Terry highlighted were: an **Add Field** function, **Delete Field** function, **Edit Subfield** function, **Edit Indicator** function, **Swap Field Data** function, and the ability to create and run macros, to name just a few. One could employ these tools, or make changes manually.

For purposes of the demonstration, Terry deliberately invalidated a MARC record (so as to showcase the features of the program), ran the MarcBreaker utility, and then loaded the code-heavy data into the MARC Editor. Before making the changes to correct the record, he ran one more utility within the MARC record which is invaluable to catalogers: the MarcValidator. This program checks the record based upon the standard (or not-so-standard) rules for MARC format. (Rule sets may be loaded into the program depending on one's preference). When the Validator finds bad data or MARC fields, it flags them for the cataloger or information professional, highlighting all bad fields in red. I found this to be a very valuable tool.

Next, Terry made several corrections based upon the results (though in this case he already knew where the bad data were). He added a subfield, deleted and added another MARC field (LC number), and swapped a couple of fields. Finally, he uploaded the corrected data back to its original source using the MarcMaker utility.

MarcMaker is the final step in the MarcEdit triumvirate. It takes the corrected record in mnemonic text format and uploads it back to its original destination in MARC format (where it is ready to be used by OPACs and other electronic catalogs).

Terry assured us that every step he took can also be done as a batch process, in which one downloads a large set of MARC records into the MARC Editor (after *breaking*) and makes global changes to those records using a special SEARCH feature, which enables one to choose specific aspects of that larger file of records (particular fields, indicators, etc.) and make global changes to the entire set of MARC records with just a few clicks. One would then upload the large set of records back to where it came from using the MarcMaker utility. He also mentioned that for global changes there is what is called a **Special Undo** function, which enables one to completely *take back* or undo one global edit action. This is extremely useful for obvious reasons (not the least of which is we are all human).

The majority of the program and lecture covered this *triple threat* utility set – MarcBreaker, MARC Editor, and MarcMaker. It is meant to be used together, and frequently, by catalogers. However, it wasn't all Terry Reese covered and it wasn't all that MarcEdit can do by a long shot. Another major purpose also lay in using its extensible features to translate from one metadata language to another (for instance, EAD to Dublin Core), or to convert from one format to another. One can even

convert data from Unicode (the data we are most familiar with and read every day) to Dublin Core, XML, or EAD. And, one can convert from any of these metadata languages to any other metadata language. On top of this, MarcEdit's capabilities are growing all the time; Terry adds new updates frequently and does large updates every 4-6 months.

A few other features of the MarcEdit program which Terry highlighted were:

The MARC Preview function – This feature provides a visual of how an edited record will look when uploaded. Then one can simply right-click anywhere in the MARC Preview screen and choose to continue editing the record.

OAI Harvester – Terry touched very briefly on this, though we didn't have time to look at the utility. This feature allows one to literally generate records in any metadata language format by loading text into the utility and choosing the preferred actions and destination.

Marc Tab Delimited Text Translator – This incredibly handy feature allows users to convert normal everyday Unicode into MARC format using an Excel spreadsheet. There is all kinds of potential here.

OCLC Connexion Bib File Reader – He only mentioned this feature in passing, but its purpose is to download records from Connexion for updating.

MarcEdit Z39.50/SRU Client – Barely mentioned, but the idea here is to do the same thing with Z39.50 records from other localities as with Connexion.

Terry also made a brief mention of a recent update which can adapt MARC files in other languages and then format them for coding. As an example, he showed us a screenshot in which a MARC file was converted to Arabic and formatted so that the fields read from right to left, in keeping with the Arabic language! Amazing stuff, and he is adding new updates all the time.

There are other utilities in the MarcEdit program which Terry didn't have time to go into, but in the time allotted the presentation was very successful and very well-received. The screenshots and demonstrations were clear, and the lecture as comprehensible for the neophyte as could be, considering the time constraints. MarcEdit is not a program which lends itself well to simple explanations, but it is incredibly rewarding for those who take the time to explore its mysteries.

Though the MarcEdit program has been around for a few years, this is the first time it has been featured at the AALL Conference. It is plain to see from the lecture and the insight we all gained into its workings, that it is not only the ultimate application in terms of interoperability, extensibility, and flexibility, but that it is a continuously evolving application as well, designed to keep up with the changes in technology, metadata languages, schemas and coding, thanks in large part to the efforts of Terry Reese himself. In short, MarcEdit is a classic, but one which is destined to hang around for a very long time.

Program Report

MarcEdit: A Magic Wand for MARC Records

*Reported by
F. Tim Knight
Osgoode Hall Law School Library at York University*

What a wonderful opportunity to see Terry Reese talk about his program MarcEdit. MarcEdit provides a flexible editing environment for MARC records and is a tool that many cataloguing and technical services librarians are familiar with. It was great to see this program included as part of the AALL meeting.

MarcEdit was developed in 1999 as a series of coding exercises, with Terry eventually settling on C# as the language used in the current version. It originally focused on manipulating large vendor record sets. It provides a preview mode that allows work to be done on a subset of records, with edits applied to the whole set. Gradually it has become a sophisticated *metadata suite* that is XML-aware, can produce MARC/XML and can harvest records from OAI databases like dSpace.

What makes MarcEdit such a great tool is the way it breaks out MARC records and places them in what is essentially a word processing environment. This provides the familiar editing capabilities such as search-and-replace and cut/copy/paste. Added functionality allows for manipulation of metadata in specific MARC tags, fields and subfields. It's also available to the cataloguing community for free and is updated regularly. Terry provides fantastic support: "I answer every question I get about MarcEdit."

MarcEdit accepts any flavour of MARC and will generally try to *heal* your records when it encounters problems, providing cues (like text in red) that direct you to appropriate corrections. In addition to being *MARC agnostic*, MarcEdit handles character set conversions. MarcEdit currently supports conversion between any known Windows character set and MARC8. This is extremely handy when MARC record sets provided by a vendor do not match the character set that is compatible with your ILS.

Terry seems to approach his work with curiosity and an eye to continuous improvement. This was evident during his presentation, where he experimented with a Linux install of MarcEdit, relishing the challenges that this brought him. I admire this attitude of always trying out something new or working in a new way; it can lead to interesting results and fuel new innovation. On the other hand, I also found it a bit distracting and wondered if those less familiar with MarcEdit might end up associating the glitches with the program rather than the operating environment(s) Terry was working in.

Terry also did a lot of flipping back and forth between his presentation slides and the live demo of the program which sometimes confused the feature he was demonstrating. These distractions were amplified by the layout of the room, which widely separated the speaker and the presentation slides on either side of a large room scattered sparsely with participants. (There was a good turnout but it was lost in the large room). These are minor quibbles, to be sure, and certainly were made up for by the presentation slides Terry provided, which are posted on the OBS web site at <http://www.cmcgc.com/media/handouts/290725/EDU-B6-33740-A.pdf>. But perhaps these points are worth considering when planning future presentations. Unfortunately, there was no time left for questions, but a follow-up roundtable session provided participants with a chance to ask Terry questions and discuss any issues they were interested in.

I'd heard of MarcEdit for years but hadn't really started using it until I got involved with batch-editing sets of MARC records for electronic resources. Lately I've been using the MARC validation feature to check and prepare records before uploading them to OCLC, and I'm considering using it as a database maintenance tool by exporting records and doing global edits outside of our ILS.

As mentioned, Terry provides excellent support, and you'll also find a number of tutorials on YouTube to get you started. It's really quite easy to pick up, and has been designed to allow programmers to build on top of it. Once you've used it a few times you'll quickly begin to see how powerful and, yes, magical it can be.

Program Report

Next-Gen Integrated Library System (ILS) Features Relevant to the Private Law Firm Library

*Reported by
Elizabeth Geesey Holmes
Partridge Snow & Hahn LLP*

The two presenters for this program were librarians from Debevoise & Plimpton LLP: Steven A. Lastres, Director of Library and Knowledge Management, and Bess Reynolds, Technical Services Manager.

This session targeted attendees interested in next-generation features of integrated library systems, and how they are being implemented in law firm libraries. The presentation began with an overview of the benefits of next-generation ILS solutions, which have a direct impact on delivering improved, cost-effective patron services. Using several case studies from Debevoise & Plimpton, the presenters showed how they incorporate various features into their ILS and how their technical services librarians have taken a proactive approach to deliver and organize information using their existing system. They concluded with a discussion of the impact of implementing these features on the technical services staff.

The first case study showed how the presenters are using their local system in conjunction with third-party vendors to manage digital content. They subscribe to Serials Solutions, a service familiar to many academic libraries, but fairly new to firm libraries. Serials Solutions provides records for batchloading into their local system. These records link users directly to electronic serials content. They also use Serials Solutions to compare resources across vendors and generate overlap analysis reports. With Serials Solutions, they can also automatically check-in electronic serials issues and route them to firm members. These issues are then archived and attached to their corresponding bibliographic records, so if an attorney loses an email with a routed issue, he or she can easily access the issue in question.

In the second case study, the presenters highlighted the use of their ILS for knowledge management. Reference/ research requests that are input into the Knowledge Builder module are searchable by both staff and patrons. In addition, related documents can be attached to the records for future reference, and they can link to websites. These features can be used to provide answers to frequently asked questions, and as a way to track reference and research requests. The presenters are

also using this module to catalog the firm's archives and memorabilia collection. They have defined custom fields and are linking to digitized images of the archival materials.

The third case study showed how the presenters use Web 2.0 features in their ILS. They use RSS feeds for new titles, and patrons have the ability to see and edit their routing lists. They encourage their partners and practice group chairs to use the comments feature to rate materials and write reviews, which are particularly useful for new associates. They also have an ILS module that is an *on-the-go* interface for Blackberries, which most attorneys have with them at all times. In addition, their records are linked to Google, allowing other enhanced information, such as book jackets and tables of contents to be displayed.

My favorite case study was on the use of RFID tags and self-checkout to track library materials. Using this new checkout and tracking system, they have reduced their expenditures for replacement materials by 90%! Since privacy is not an issue in firm libraries, attorneys also know who has an item if it is checked out and can find it even if library staff are unavailable. In a firm library saving the time of the attorney is a main goal.

While both speakers were from the same firm I did not get the feeling that they were promoting a particular vendor or system. As I am in the process of looking at integrated library systems for my library, I did know which system they are using, but I also know that several other vendors are offering or working on similar features. What was particularly useful and interesting was to see how the presenters were employing these new features in the private law library setting. Their goal is to give patrons *one-stop shopping* from their desktops or blackberries 24/7. Even if they prefer to call for assistance, having everything together in one place enables the librarians and staff to find information quickly. As they concluded in their closing slide, "Enriching the catalog adds value because attorneys do not want to search, they want to find."

Editor's note: This program was cosponsored with the Private Law Libraries SIS, so Beth's report is also published in PLL Perspectives 21, issue 1 (Fall 2009) at <http://www.aallnet.org/sis/pllsis/newslett/fall09.asp#wrapup6>.

Program Report

Peer Collaboration

*Reported by
Karen Nuckolls
University of Kentucky Law Library*

This program was presented by University of Georgia law librarians Wendy E. Moore, Acquisitions Librarian, and Carol A. Watson, Associate Director of Information Technology.

Forming Teams

Carol Watson discussed various organizational structures at the University of Georgia Law Library. There are eight librarians. Team management formulation began with the Collection Development Team in 2000, which had retreats, meetings, etc. It also had facilitation training, and currently meets every two weeks for 75 minutes. There is a steering committee, and leadership is rotated. Minutes are posted on the Internet.

Ground rules for meetings were discussed and agreed upon at the very beginning of the process. All teams consist of librarians and staff. Most staff are on two teams, and librarians are present on up to seven teams. Every librarian leads at least one team.

Wendy then discussed *boring management stuff*: cohesion, confidence (shared among team members), and citizenship (allegiance beyond self). Carol enlightened us on the term *pecha kucha*, or "chit-chat." We were shown about 20 slides, with quotes from staff and librarians about team management experiences. Their director has had no regrets about the process.

Pluses and Minuses

Of course, there are pluses and minuses to team management, and Wendy discussed these.

Pluses:

- Accomplish tasks/goals that don't fit under one person's job description or a department's function
- Better end results due to combined brain power. Less second-guessing or backtracking
- Assists in helping new members of the library adapt to the work of the library more quickly and to buy into the mission of the library

Minuses:

- Enormously time-consuming
- Need to spend time formulating a good agenda and then sticking to the agenda
- Creating consensus (or the appearance thereof) can get overdrawn

What You Can Do

Remember that the reason for forming teams is to better accomplish the work of the library. How does one begin?

- Form a team for a special project
- Utilize agendas, ground rules and minutes within your current meeting structures
- Ask an independent individual to serve as a facilitator for your discussions

In addition, the handout for this program was very detailed and an excellent aid for those interested in starting team management structures in their libraries. It is available at

<http://www.aallnet.org/sis/tssis/annualmeeting/2009/handouts/peercollaboration-moore-handout.pdf>.

Program Report

Taking the Aggravation Out of Aggregators: An Update on Aggregator-Neutral Bibliographic Records

*Reported by
Pam Deemer
Emory University Law Library*

Ellen McGrath (University of Buffalo Law Library) and Karen Selden (William A. Wise Law Library, University of Colorado, Boulder) coordinated this program, which Karen Selden also moderated. The speakers were Eugene “Gene” Dickerson (Ralph J. Bunche Library, U.S. Dept. of State) and Kara Killough (Serials Solutions).

Karen Selden gave a little bit of background on the program before introducing the speakers. The Provider-Neutral E-Monograph Record Task Group was formed by the Program for Cooperative Cataloging in 2008. Yael Mandelstam (Fordham University, School of Law) and George Prager (New York University, School of Law) were members of the Task Group. George Prager also co-chaired the Task Group. The Task Group issued its final report on April 25, 2009, but commentary from the cataloging community was still accepted. The latest date on the report is July 30, 2009. See <http://www.loc.gov/catdir/pcc/bibco/PN-Final-Report.pdf>. Becky Culbertson (University of California, San Diego), Yael Mandelstam, and George Prager also published the official *Provider-Neutral E-Monograph MARC Record Guide* on July 31. See <http://www.loc.gov/catdir/pcc/bibco/PN-Guide.pdf>. Implementation began August 1.

Gene Dickerson spoke first, outlining what a provider-neutral record is, why it is needed, the history of the concept, and its implementation. Faced with the confusion of the same online serial contents often provided by different aggregators, since July 1, 2003, CONSER implemented the creation of provider-neutral bibliographic records for online versions of titles, i.e., no provider/aggregator mentioned on the master bibliographic record. In addition, OCLC has been deleting separate vendor-specific bibliographic records, such as those for HeinOnline, EbscoHost, FirstSearch, and so on. He then went on to describe the history of the provider-neutral e-monograph record: the discussion at a BIBCO Operations meeting in May 2008, the formation of the task group in the summer of 2008, the issuance of the final report in April 2009, the BIBCO Operations discussion May 1, 2009, and the revised report issued by May 30, 2009. Originally implementation was to take place July 17, but possibly it was good for us that it took place after AALL. For the rest of his presentation, Gene reviewed the description and date elements in a provider-neutral record both for original cataloging for inclusion in OCLC (or any other widely-shared bibliographic utility) and for local copy cataloging purposes, where one can tweak records to add information for local needs. There is too much to note here, but you can go to the AALL site for the handout at <http://www.cmcgc.com/media/handouts/290725/EDU-F6-33742-A.pdf>.

I was particularly interested in the vendor viewpoint, as a provider-neutral bibliographic record in a widely-used database would not seem to help vendors promote their services. Kara Killough (Serial Solutions) initially covered much the same territory as Mr. Dickerson. Ms. Killough defined a provider-neutral record, presented issues from the library perspective, listed the benefits for having one record, and related the history of the CONSER policy. She described the e-monograph cataloging model and its use for serials and monographs, for both original and copy cataloging. She introduced a term that was new to me for an aggregator/provider of electronic resources: ERAMS, which stands for e-resource access and management services vendor. She did go into a little more detail about creation of a provider-neutral record from print (addition of 006/007, 008 byte 23; print ISBN from \$a to \$z; \$h [electronic resource] after title proper; 300 1 online resource; 500 Description based on print version note; 655 genre heading; 776 \$i Print version, \$z print ISBN; 856 \$u), and about possible library-specific

customization of base provider-neutral records (049 local holdings; 506 or 856 \$z local access restrictions; 710 Package/database name; 830 Package/database name; 856 \$u institution specific URLs; 856 \$z full text available from...; 9xx added as needed). In addition, she showed examples of records pre- and post-customization.

The third part of her presentation concerned the importance of a knowledgebase and what it is: 1. A repository of metadata from content providers, 2. A repository of authority bibliographic information from cataloging sources, and 3. The core of an ERAMS vendor service. The metadata of a knowledgebase presents the following challenges to its providers: 1. Source information often needs manipulation, 2. Reliability, and 3. Changes and growth. Ms. Killough then suggested some best practices for handling the challenges: 1. Participate on standards boards to influence data at a universal level and keep current, 2. Build direct relationships with content providers, 3. Supply a standardized framework to help publishers with data distribution, 4. Invest in internal tools and processes that help manage data at an authority level, and 5. Maintain MARC records at the source. In relation to this, she told us about KBART, Knowledge Bases and Related Tools. This is a UKSG (UK Serials Group) and NISO (National Information Standards Organization) joint working group effort to develop and publish guidelines for best practices to promote smoother interaction in the knowledgebase supply chain and to educate. KBART is supposed to be applicable to all textual materials. A next version of the draft is due soon. They have defined 15 elements of the structure for data transfer and are moving to the testing phase. With direct relationships, access to data, and a metadata application profile, a collaborative environment should enable good knowledgebase maintenance. This would consist of data updates, holdings data correction with rules to prevent overwritten data, title authority/normalization, and MARC data maintained at the source.

In summary, both speakers emphasized that provider-neutral records would reduce confusion, provide better patron access, and eliminate repetitive maintenance on multiple records, thus saving time and money. They also reassured the concerned that when loaded into a library's own ILS or discovery tool, the records can reflect local conventions. In fact, from Emory Law Library's own experience and a trek through the exhibit hall at this Annual Meeting, vendors such as Cassidy Cataloguing have confirmed provider-neutral records can be customized for a specific library to be not so neutral after all.

If I can interpret my notes correctly, George Prager announced that the guidelines for tweaking for special cases would be posted after August 1. And in response to a question from the audience, he advised that if a cataloger cannot determine if an ISBN is for print or online, it should go in \$z of the 020.

Program Report

The TOC Market Report: Undervalued TOCs Yield Huge Dividends

*Reported by
Sima Mirkin
American University*

This OBS-sponsored program was organized by Sally Wambold (University of Richmond). Sally asked reference librarian Mary Whisner (University of Washington School of Law) to moderate the program. Mary turned out to be a great choice for this role. In her introductory notes she set a very engaging and thoughtful tone. Her introduction was followed by two engaging speakers. The result was the attendees' lively participation, which slightly changed the format for this session (presentations, then discussion). The discussions happened to be spontaneous and interposed with the presentations.

Mary Whisner remarked on how the presence of indexed tables of contents (TOCs) in bibliographic databases has contributed to the information retrieval process. Chapter titles and authors are not hidden anymore and are available at patrons' fingertips, making the research process more comprehensive and rewarding.

Mary introduced two speakers, both veterans of technical services departments: Christine Mitchell, Blackwell's Product Manager, and David Williamson, Cataloging Automation Specialist of the Acquisitions and Bibliographic Access Directorate of the Library of Congress (LC). Both Christine and David have been heavily involved over the years in the process of bibliographic record enrichment with TOCs. Christine manages this service at Blackwell. David initiated a number of automation products at the Library of Congress, including the uploading of TOCs into bibliographic records. He makes things happen behind the scenes.

Christine gave an overview of TOC enrichment services from the vendor's standpoint. She started with the history of this service as it has been offered by the Blackwell. This work began in 1991 by capturing TOC data from books in paper copies and then creating scan files. Currently, TOCs in PDF format are becoming more and more available from publishers. Blackwell collects TOC data for monographs from its approval plans, and currently holds 800,000 TOC records, with more than 1,000 being added weekly. Twenty percent of these TOCs are related to social science, political science and law

classifications. The TOCs are always checked for their usefulness and level of granularity, and are also manually reviewed for spelling, format and accuracy.

Christine showed slides of bibliographical records with TOC data from the online catalogs of three Innovative libraries: University of Michigan Law, Georgetown University Law, and University of Georgia Law. These slides sparked participants' interest, and questions about the indexing and authority control followed. Blackwell's TOC enrichment service does not provide authority control at the moment. Christine's interviews with all of the representatives of the above-mentioned libraries revealed that all of them value the presence of TOCs in their records, because they provide chapter-level information discovery via title, author and keyword indexes and allow detailed online browsing. Clara Liao, Head of Cataloging and Metadata Services at Georgetown Law Library, reported that her department is currently engaged in an authority control project for TOC entries.

Currently, there are three major TOC vendors: Blackwell, Marcive, and Syndetic Solutions. Blackwell and Marcive provide MARC record enrichment, whereas Syndetic's model is different – it provides OPAC enrichment via links from the catalog to the TOCs on a remote server. This model offers *like the book* display, and the TOCs are beautiful in Syndetic's model. However, both the Blackwell and Marcive models offer format options that facilitate the display of TOCs displaying them as they would appear in books, as well as perpetual ownership of the enrichment data. Furthermore, Syndetic's model is not searchable unless libraries implement AquaBrowser with Syndetic's ICE (Indexed Content Enrichment) tool, which indexes the TOCs residing on the remote server. With the OPAC enrichment model, activation links are included in catalog records. An ILS vendor's involvement is needed to provide seamless display. The TOC data is *licensed* by the library rather than owned.

The MARC record enrichment model offers three formatting options of TOC data within the MARC record: 505 standard paragraph, 505 sub-fielded paragraph (MARBI) and local 9xx fields – one field per chapter. This model's workflow is as follows: the library extracts a file of records from its OPAC and sends it to the TOC vendor; the vendor enriches the records and sends them back to the library. The MARC record enrichment model provides indexing of key terms, indexing of chapter author names (subfielded formats), ownership of the TOC data, and *like the book* display. The library is charged only for the records enriched. It controls timeline, schedule, frequency and budget.

Christine concluded her presentation by describing the main considerations for selecting a TOC vendor. These are: vendor's data content and sources, data licensing versus ownership, and cost of service (which can be projected according to the initial *hit rate*, which can be provided by the vendor). The indexing-searching-formatting capabilities of the library's ILS as well as its display options are also important in planning this service. Libraries should consider whether to start the enrichment process from current titles or include retrospective imprint years, and whether to enrich the whole collection or specific subject areas and collections.

The audience reacted enthusiastically to Christine's presentation. Some with AquaBrowser with ICE installed in their libraries gave it high marks. There was a question about the integration of TOC chapter titles in the ILS title index in the MARC record enrichment model. Christine replied that these are fully integrated, and to make this happen Blackwell offers the option of removing initial articles. In response to a question about the availability of TOCs in foreign languages, Christine noted that Blackwell enriches English language monographs only.

David Williamson was the next speaker. David started his presentation by citing cataloging authorities, such as Roy Tennant, Vinh-The Lam, Karen Calhoun, and Karen Markey, who all emphasize that additional natural language vocabulary in bibliographic records in the form of TOCs enables greater possibilities for users to discover and retrieve materials that would otherwise stay hidden. An increase in the number of unique words in a record brings another advantage to the discovery process: "If a bridge to bib records is established, key words would provide effective access to controlled vocabularies." (Marcia Bates & others, 1990s)

According to a 2009 study by Karen Calhoun and Janet Hawk, *From Online Catalogs: What Users and Librarians Want*, both end-users and librarians want more subject information in records, which can be provided by enhancements to bibliographic records such as TOCs, summaries and abstracts.

David said that in his position for the past twelve years as Cataloging Automation Specialist and a member of the LC Bibliographic Enrichment Advisory Board, he has been involved in many automation projects, including projects for providing TOC data. Currently, there are five major TOC enrichment projects at LC:

dTOC (digital table of contents) – Actual scanning of TOCs. This project started 15 years ago with a grant from Edward Lowe to provide more information about materials to LC users. Now the scope of this project includes all languages and

subjects. The catalogers select TOCs to be scanned according to their usefulness. A technician then creates photocopies of the TOC pages and scans them. Roman scripts are converted to text files, non-roman to PDF. All are linked in 856 fields.

Korean TOC – The actual TOCs are downloaded from the National Library of Korea website and linked in 856 field. They are searchable in Korean.

E-CIP (Electronic Cataloging in Publication) – LC does not currently accept paper applications for CIP unless the publication is very complicated. Currently, 99 percent of CIP applications are online. Since the whole application is already in electronic format, it is easy for LC catalogers to convert the submitted TOCs into 505 fields with the help of special software. Approximately 35 percent of e-CIP records have 505 fields in them, which amounts to about 19,000 records per year.

ONIX (ONline Information eXchange) – TOCs are extracted from ONIX data supplied by publishers. This is the same data that book vendors such as Amazon, Barnes & Noble, and Borders receive. David is a recipient of this data on the LC side. ONIX data delivery from publishers is a free service. The publishers allow you to choose the frequency with which you want to receive data feeds. In the case of Cambridge University Press, one can even restrict ONIX data to specific subjects, and/or limit it to particular geographical areas. The extracted TOCs from ONIX data are all linked in 856 fields. The number of links in the LC catalog created from ONIX data is approaching one million (on average 5K-35K per year). And these are not just the TOCs, but summaries, author notes, reviews, etc. Publishers now create TOCs for retrospective materials printed on demand because this data attracts interest and brings additional attention to these publications.

ONIX itself is an international standard for information exchange in the publishing industry. World coordination is provided by EDItEUR, which is an international group based in London with 90 members from 17 countries. U.S./Canada are represented by the BISAC Metadata Committee. BISAC stands for Book Industry Standards and Communication, a set of standards developed by the Book Industry Study Group (BISG). David himself is a member of the BISAC Metadata Committee, which meets in New York regularly and deals with issues having anything to do with metadata in the publishing industry. Documentation and information about ONIX data is available at <http://www.editeur.org> and <http://www.bisg.org/what-we-do-21-15-onix-for-books.php>. David receives ONIX data from the top U.S. publishers and a number of foreign countries.

David demonstrated the structure of the ONIX record and described its fields. Questions from the audience about the labor intensity of the data extraction process from ONIX records followed this demonstration. David explained that the whole process is automated and is done with the help of software written by him. There was also a question about the possibility of duplicating the TOCs in 505 fields created in the course of the e-CIP with the TOCs in 856 fields extracted from the ONIX data. David acknowledged that this duplication actually takes place.

The ONIX Pilot project is being conducted in response to several recommendations in *On the Record: Report of The Library of Congress Working Group on the Future of Bibliographic Control*, section 1.1, “Eliminate Redundancies,” which calls for more use of externally available bibliographic data and for further automating the CIP process.

The idea of creating e-CIP records using ONIX data as the basis is a very constructive one. The same ONIX records can be used both in the e-CIP process and to create ONIX TOCs. It takes under 15 seconds to convert the ONIX data into a starter bibliographic record. The TOCs end up in 505 fields at no additional cost.

There are, however, some obstacles for utilizing this method: Publishers usually request CIP before they make ONIX data available; ONIX data is aimed towards marketing; inconsistent treatment of data makes it difficult to apply the program; and LC currently lacks an XML repository. However, currently the ONIX standard is moving to the ONIX-3 version, which will provide better, more reliable, and more usable data.

David demonstrated an actual bibliographical record created by the ONIX Pilot software and explained the fields. A lively discussion followed. Among the questions was one about the applicability of *RDA* standards to bibliographical records created by ONIX Pilot software. The answer was that ONIX data can be easily conformed to *RDA* standards, as there is less concern about formatting, punctuation and capitalization with *RDA*. Another question was about whether ONIX data is limited to only e-CIP materials. The answer was that by no means is this data limited just to this group. E-CIP publications were just the starting point. A question about the difference in TOC formats created from e-CIP versus ONIX led to a demonstration of ONIX’s codes by David.

At this point Mary Whisner wrapped up the session by thanking Sally Wambold for having the vision to put this program together. Mary was also impressed by the passionate involvement of the audience. She then expressed gratitude to Christine and David for sharing their expertise.

Hot Topic: Working with OCLC's Record Transfer Policy

After being involved in the workings of the OBS-SIS Special Committee on Record Sharing almost from the beginning, I thought volunteering to take notes from this meeting would be very easy. But really it was not! Keiko Okuhara (University of Hawaii) co-coordinated this program, and presenters were: Roberta Schaffer (Library of Congress, and member of the OCLC Review Board on Principles of Shared Data Creation and Stewardship) and Pat Callahan (University of Pennsylvania, Biddle Law Library, and chair of the OBS-SIS Special Committee on Record Sharing). Michael Maben (Indiana University, Maurer School of Law Library) served as moderator, and Glenn Patton (Director, WorldCat Quality Management) represented OCLC.

On November 4, 2008, OCLC announced the release of its new *Policy for Use and Transfer of WorldCat Records*, available at <http://www.oclc.org/worldcat/catalog/policy/recordusepolicy.pdf>, as a replacement for the *Guidelines for the Use and Transfer of OCLC-Derived Records* (November 16, 1987). The new policy elicited concerns and generated discussions in the library community.

The Hot Topic program addressed the following questions prompted by this very controversial policy:

- Are these new policies fair to members who contribute original records?
- How do we see the future of OCLC?
- How do we interpret the new OCLC policy? Can we defend our right to our records?
- Can OCLC claim copyright to the database?
- What are the legal ramifications of such a policy?
- What constitutes *fair use*?

Michael Maben began the presentation by introducing the audience to the history behind this program. For specific information about this history, I refer you to the "Issue Summary" prepared by Michael Maben at <http://www.aallnet.org/sis/tssis/annualmeeting/2009/handouts/hottopic-mabensummary.pdf>.

Following Michael's presentation, Roberta Schaffer discussed the roles of the OCLC Board of Trustees, Members Council, and Review Board on Principles of Shared Data Creation and Stewardship, of which she was a member. Roberta, a lawyer, talked about the legal meaning and ramifications of the definitions of *policy* vs. *guidelines*.

She reported on an unscientific survey conducted by the Review Board on Principles of Shared Data Creation and Stewardship meant to solicit a quick overview of member reactions to the new record transfer policy. 1,620 respondents completed the survey between March 25 and April 8, 2009. The respondents were represented by the following categories:

- 82% OCLC members
- 50% Academic libraries; 23% Public libraries
- 21% from outside U.S.
- 22% directors, 27% managers, 33% catalogers

For information on the results of the survey and the concerns expressed by the Review Board on Principles of Shared Data Creation see the presentation by its chair, Jennifer Younger, at http://www.oclc.org/worldcat/catalog/policy/20090518-MC-Jennifer_Younger.pdf. Many respondents felt a lack of communication on OCLC's part as to the real problem to be solved, and they requested additional information. The Board concluded that policy/guidelines are needed, but not the policy that OCLC had just drafted.

OCLC members were not sure why the 1987 *Guidelines for the Use and Transfer of OCLC-Derived Records* were replaced in 2008 by a new policy, and wondered what the purpose of the new policy was. After this policy change generated many negative reactions, the *Policy for Use and Transfer of WorldCat Records* was removed from the OCLC website and the 1987 *Guidelines* were reinstated.

In writing its replacement guidelines/policy, OCLC needs to remember that it must cover a whole spectrum of users, from members to vendors. The 2008 proposed policy was definitely not doing that. Furthermore, the new guidelines/policy should be written with a view to future as well as current applicability.

Roberta Schaffer strongly recommended the involvement of all stakeholders as OCLC takes its next step to implement the Review Board's recommendation, which is to establish a Record Use Policy Development Task Force.

Pat Callahan discussed the efforts of the OBS-SIS Special Committee on Record Sharing, whose work provided feedback and suggestions for the proposed resolution which OBS-SIS sent to the AALL Executive Board. See <http://www.aallnet.org/sis/tssis/annualmeeting/2009/handouts/hottopic-aallresolution.pdf>. Subsequently AALL issued its *AALL Resolution on OCLC's Policy for Use and Transfer of World Cat Records*. See http://www.aallnet.org/about/resolution_oclc.asp.

Coordinators for this program invited Glenn Patton to attend this presentation, not as a panelist but as an observer. Glenn's role at the program was to listen to our concerns and to take them back to OCLC.

After the Hot Topic presentation I expected a *very hot* discussion, but OCLC's motives remain unclear, and participants questioned how the new policy would be *policed* once it was in place. Stay tuned and get involved, since it seems that this Hot Topic will remain hot for some time to come.

Continued from page 1

Two features of the morning program that I found particularly valuable were the break-out session and Speed Networking. Getting up and out of our chairs to meet other members of the CONELL class put words into action as we developed connections and shared our library backgrounds. For the break-out session, groups of eight met with a member of the AALL Executive Board and got to know more about AALL, and each other, in an intimate round-table setting. I was assigned to a group led by Joyce Janto, AALL Vice President, 2009-10. After introductions, we shared our paths to law librarianship, which for most people began in law school. As a technical services librarian without a law degree, this put me in the minority, but I discovered that we did have in common an interest in the rapidly changing information landscape and creating tools to help people navigate through it. Joyce spoke about her experience in AALL as an organization and at annual meetings and urged us to get involved by introducing ourselves to total strangers, which we had the chance to do moments later during Speed Networking. This activity had everyone jumping out of their chairs after a five-minute introduction and business card exchange. It was a fun and lively part of the morning where I met a cross-section of recent library school graduates, job-seekers, and those new to their positions from across the country. While we didn't have time to address weighty topics then, these were the people I took the opportunity to speak with over the coming days at conference sessions and meetings where we could spare a few more moments to get beyond that initial handshake and hello.

Following a seated lunch at the convention center, we stepped aboard two tour buses for a riding tour of presidential homes. Sitting back to watch residential Washington D.C. pass by was a perfect respite from what had been an intense morning. The architecture from grand apartment buildings to unusual embassies was more varied than I expected. Our tour bus squeezed through narrow streets so we could see the homes of Woodrow Wilson, Harry Truman, and Lyndon Johnson, among others, some more modest than I would have believed. As I jotted down notes with a pen picked up from the CONELL marketplace, I realized that my conference was already a success according to advice dispensed by Cornell Winston, AALL Board Member: "If you have to buy a pen, your conference was a failure!"

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