TSLL
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OBS SIS

Technical Services Law Librarian

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INSIDE:

The CONELL Workshop: Dispatches from the Trenches

Jen Richter
Sacramento County
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Saturday, late afternoon: Climbing back onto the bus at the conclusion of both our city tour and the CONELL workshop, I—and probably many other CONELL attendees—reflected on the day's events, lessons, and revelations. The 2011 AALL Annual Meeting and Conference in Philadelphia would begin the following day, and as this year's recipient of the TS-SIS Marla Schwartz grant to attend the CONELL workshop, I was happily anticipating the opportunity to apply all that I'd learned. I've been a law librarian for two years and some change, the latter half of which has been happily spent in technical services, primarily handling acquisitions but also dabbling in reference and various other tasks in support services. This was my first professional conference since I had transitioned from public to technical services, and I was looking forward to speaking with other "tech" librarians on the trends and challenges we're currently facing.

Saturday, early morning: The workshop began bright and early with a continental breakfast and a contingent of cheerful CONELL volunteers, all easily identifiable by the blue shirts and big smiles they were wearing. The volunteers were busy welcoming attendees, answering questions, and providing directions to navigationally-challenged folks like myself about the layout between the Marriott ballrooms and the Pennsylvania Convention Center. My fellow workshop attendees and I grabbed some breakfast and coffee and made our way into the ballroom to await the festivities. Looking at the agenda, it seemed we were in for quite a day: a who's who lineup of speakers; activities designed to break the ice and get us mingling, learning, and mingling; and a tour of Philadelphia to cap off the day.

That morning, we had the privilege of listening to some outstanding leaders in the AALL community speak of their experiences at both CONELL and the annual conferences. Each speaker touched on an aspect of membership contribution, such as publishing an article, mentoring new law librarians, or submitting a proposal for an Annual Meeting program. Later, we were able to chat in small groups with AALL Executive Board Members, gaining perspective on career paths and the value of association involvement. As new librarians, perhaps we are a bit insecure about our lack of experience, whether in the field or in a leadership position. We

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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

Send Us a Message

2011-2012 Officers, Committee Chairs, and Representatives

From the Chair

Online Bibliographic Services Special Interest Section

I am writing this after coming back from Philadelphia. The weather was a lovely 103 degrees with 110 heat index. It was an excellent reason to stay inside the air conditioned Convention Center. If you could not attend the Philadelphia meeting, next year it is in Boston. I hope to see you there.

I would like to thank the AALL staff for all of their hard work that makes the Annual Meeting run so smoothly. I would also like to thank Kathy Faust and the Education Committee for all of their hard work. In my unbiased opinion, the OBS programs were the best ones.

OBS had the following programs and events at the Annual Meeting: Joint Reception of the TS/OBS/RIPS/CS SISs, "Library in the Clouds: Cloud Computing and Its Impact on Library Services," OBS-SIS Program: "Emerging Technologies and the Library Manager," OBS-SIS/TS-SIS Joint Research Grant Committee meeting, OBS-SIS Local Systems Roundtable, "Library Operations and the Evolution of the ILS: Backfield in Motion," OBS-SIS OCLC Update and Roundtable, OBS-SIS/TS-SIS Researchers Roundtable, "*RDA* Test: Law Catalogers' Perspectives," and OBS Hot Topic: "The Public-Technical-Systems Connection: For a Great Library Experience It Really Matters." The Hot Topic speaker was Steven Bell, associate university librarian for research & instructional services at Temple University and author of the "From the Bell Tower" column in *Library Journal* online.

Our table in the exhibit hall had the book swap, Hawaiian Hershey kisses, a drawing for a $25 Amazon gift card and OBS flashlights. The winner of the gift card was Julia Jaet, from Marquette University Law School. Thank you to Keiko Okuhara for handling the OBS table.

I would like to congratulate the incoming Board members: Vice Chair/Chair-Elect: Christina Tarr, Secretary/Treasurer: Barbara Szalkowski, and Member-at-Large: Marjorie Crawford. Unfortunately this means that people left the Board. The following people have completed their terms: Past Chair: Patricia Sayre-McCoy, Secretary/Treasurer: Karen Selden, and Member-at-Large: Keiko Okuhara. They will be a hard act to follow. Extra special thanks to the members that ran for office but were not elected: Janet Hedin (vice chair/chair-elect), Calmer Chattoo (secretary/treasurer), and Kerry Skinner (member-at-large).

These members are the committee chairs for next year: Education Committee 2011: Betty Roeske, Local Systems Committee: Marjorie Crawford, Nominating Committee: Patricia Sayre-McCoy, OBS/TS Joint Research Grant Committee: Hollie White, OCLC Committee: Karen Selden, and Web Advisory Committee: F. Tim Knight. OBS *TSLL* Editorial Board representatives are Marilyn Nicely and Janet Hedin.

The Education Committee is working hard on planning some great programs for Boston. Stay tuned for the fall announcement of the Boston programs.

I hope all of you are using your OBS flashlights. Remember my theme is "Quality not quantity." I will try to keep communications brief.

Betty Roeske
Katten Muchin Rosenman LLP

From the Chair

Technical Services Special Interest Section

When I attended my first TS-SIS business meeting in Boston in 1993, I had no idea at that time that the gavel would be passed to me at the meeting in 2011. When I think back to all of the meetings and sessions I have attended at AALL throughout the years, I realize that this organization made up of my peers helped to sharpen my skills as a law librarian. It is indeed a privilege and honor to serve as your chair for 2011-2012.

Many thanks go to Pamela Deemer for her dedication, leadership, and service as chair for 2010-2011, as well as recognition to outgoing officers Chris Long, past chair and Bylaws Committee chair, and Katrina Piechnik, member-at-large, for their wonderful service to our section.

I would like to share some highlights of the TS-SIS at the 2011 AALL Annual Meeting in Philadelphia.

While the weather outside may have been extremely warm, the programs and discussions inside the much cooler convention hall were excellent this year. Pamela Deemer represented TS-SIS at the CONELL Marketplace. Katrina Piechnik organized the Joint Reception at Maggiano's Little Italy. The food was delicious and the atmosphere was terrific. Innovative Interfaces kindly sponsored the event. Mary McKee and George Prager co-presented the 2011 Renee D. Chapman Memorial Award for Outstanding Contributions in Technical Services Law Librarianship to Yael Mandelstam, head of cataloging at Fordham University School of Law Library in New York. Her contributions to law librarianship have been numerous, and Yael is very deserving of this award. Another commendable recognition included a certificate of appreciation to Martin Wisneski for his service and contribution as our TS-SIS webmaster.

The TS-SIS activity table in the exhibit hall was buzzing with excitement. Katrina Piechnik coordinated a successful silent auction. Aaron Kuperman was available to answer questions about *Classification We*b and *RDA* as our "Ask the Cataloging Expert." Thanks to everyone who volunteered at the activity table. Ajaye Bloomstone, Education Committee chair for 2010-11, and her committee provided a great array of technical services programs. Each program coordinator, moderator and speaker inspired and energized us. The online evaluation survey for TS-SIS sponsored programs at the Annual Meeting was updated by Suzanne Graham.

If you were not able to attend the conference this year, we missed you. I encourage you to check out ALL2Go and the TS-SIS website for valuable resources.

As we shift thinking to next year, the Education Committee, chaired by James Mumm, is already hard at work brainstorming, reviewing, updating, and polishing program proposals for the 2012 Annual Meeting in Boston. At the business meeting in Philadelphia it was decided to appoint members to an Ad Hoc Committee on Strategic Planning. Please consider how you could serve on this committee. Volunteers are always welcome.

The new members of the TS-SIS Board are Miriam Childs, vice chair/chair-elect, and Richard Paone, member-at-large. Continuing board members are Pamela Deemer, immediate past chair; Elaine Bradshaw, secretary/treasurer; and Suzanne Graham, member-at-large.

The committee chairs and representatives who are serving during 2011-2012 are:

Acquisitions Committee: Eric Parker
Cataloging and Classification Committee: George Prager
Preservation Committee: Sally Wambold
Serials Committee: Wendy Moore
Awards Committee: Michael Maben
Bylaws and Handbook Committee: Pamela Deemer
Committee on Professional Development: Aaron Kuperman
Education Committee: James Mumm
Membership Committee: Carol Collins
Nominating Committee: Carmen Brigandi

Joint Research Grant Committee: Hollie White
Joint Research Grant Committee representatives: Susan Goldner and Chris Long
AALL SAC representative: John Hostage
AALL CC:DA representative: Ellen McGrath
MARBI representative: Pat Sayre-McCoy
TS-SIS representatives on the *TSLL* Board: Gwen Gregory and Lorna Tang
Website Manager: Martin Wisneski
Discussion Forum Managers: Alan Keely and Smita Parkhe

I am looking forward to working with new and returning board members, committee chairs, and representatives as well as with Virginia Bryant, *TSLL* editor-in-chief.

Working as a team, we can accomplish much to make TS-SIS a dynamic and vibrant special interest section. I look forward to an exciting and productive year.

Ismael Gullon
Mercer University

Renee D. Chapman Award Presented to Yael Mandelstam

George Prager
New York University Law School Library

Introduction

Good afternoon. I am honored to have been asked to co-present the Rene D. Chapman Memorial Award for Outstanding Contributions in Technical Services Law Librarianship to Yael Mandelstam. I'm glad I got the name of the award correct. Early in the process of nominations, I kept on referring to the award as the Mary Chapman Award. Those of you of a certain vintage in TS-SIS will remember Mary, a long-time technical services librarian at NYU Law School, quite respected, but NOT the Chapman after whom this award was named! Now that we have that out of the way …

For those of us in this room, it may be hard to remember a time when Yael was NOT a primal force in our field—no disrespect intended to the many superb law catalogers and technical services librarians who have been with us for longer. I say this because Yael has managed to accomplish so much in our field, so quickly. I will enumerate a few of her outstanding accomplishments, of which many or most you are already aware.

Chairing committees—General

Yael has chaired several projects and groups, not only within law librarianship but within the larger cosmos of cataloging and metadata. Luckily for me, I've served on many of her committees. Often Yael asks me to join a task force or group she is chairing. I always accept—first, because it's an offer I can't refuse, and second, because I know that the work will be stimulating, and that ANY task force she is leading will accomplish what it's supposed to do (and probably more). Those of us who have served in groups with ineffectual leaders know how frustrating that can be.

Work on Provider-Neutral Guide

A few years ago, for a change, it was the other way around. I co-chaired the Provider-Neutral E-Monograph Record Task Force with Becky Culbertson, and I asked Yael to join. The three of worked together synergistically. When it came to any aesthetic decisions, the other co-chair and I quickly learned to "just leave it to Yael." This makes sense, because Yael's first choice of career was as a fashion designer. (I tried to pry some lurid tales of the fashion world from her—but to no avail. I also resisted the temptation to ask her husband Ken.) However, many of the skills that made her a successful fashion designer also contribute to the excellence of her work in law librarianship. Those fashion designer skills are definitely not going to waste.

She has served as a co-author for all iterations of the provider-neutral guide. Partly because of her work on the guide, she was appointed as a member of the Program for Cooperative Cataloging (PCC) Standing Committee on Standards, an important and prestigious position.

Inherently Legal Subject Heading Project

Now for a bit of nitty-gritty. Yael volunteered to become head of an Inherently Legal Subject Headings Project in 2004. For years, law catalogers at AALL conferences and elsewhere had discussed how to deal with "inherently legal" subject headings, but somehow little was accomplished. The concept of an "inherently legal heading" is one of the more difficult ones for newer law catalogers to grasp, not to mention non-law catalogers and general users. Some Library of Congress subject headings, such as COPYRIGHT, are considered to be "inherently legal." As such, they are not used with the subdivision LAW AND LEGISLATION. If cross references with LAW AND LEGISLATION appear in the subject authority records of these inherently legal headings, it is much easier for catalogers to correctly assign these subjects, and machine validation of headings is greatly assisted. Most importantly, library users will be directed to the correct heading. But many of the subject authority records lacked cross references with LAW AND LEGISLATION, which contributed to the proliferation of LC subject headings in OCLC and OPACS that used LAW AND LEGISLATION incorrectly. Yael organized the formidable amount of work required for the project into several manageable and "inherently logical" steps. After inherently legal subject headings were identified and discussed, proposals were submitted to the Library of Congress to add cross references with $x LAW AND LEGISLATION to several hundred subject authority records. The project was completed in 2009.

Genre/Form Terms for Law Materials Project

Yael also founded and chaired the Genre/Form Terms for Law Material Project in 2008. "Genre/form terms" are used to describe what a work is, rather than what it's about—in her words, "isness" rather than "aboutness." For example, HORROR FILMS would be used as a genre/form term for an actual horror film, not for a work about horror films. TREATIES would be used for a text of a treaty or treaties, not for a work about treaties. Yael marshalled a group of opinionated catalogers through a thorough identification and review of suitable law genre/form terms, developing reference structures and scope notes as needed for those terms. On the way, she established an excellent working relationship with the Library of Congress' Policy Standards Division (PSD). Last year, LC approved the list of genre/form terms for law materials, and integrated the list into the genre/form authority file. The law genre/form thesaurus was one of the first genre/form thesauri approved by the Library of Congress.

Law Genre/Form Implementation Project

Yael is now leading a follow up project: The AALL Law Genre/Form Implementation Project, with the ultimate goal of getting these genre/form terms retroactively into OCLC, and providing a metadata crosswalk that will be made available for libraries wishing to add the terms retrospectively to their OPACs.

She has recently concluded six years as AALL's Representative to ALA's Subject Analysis Committee (SAC), but continues as a key contributor to SAC.

Batchloading Presentations & Expertise

Yael has given several presentations at AALL meetings on the best methods for batchloading vendor records, and has worked closely with Terry Reese, the creator of MARCEdit, on ways to de-dup records lacking unique numerical identifiers.

New York City Contributions/Mentoring

Yael is a frequent speaker at local cataloging groups in the New York City Metropolitan Area, especially the Big Apple Catalogers' Klatsch (B.A.C.K.). She has served as a mentor to many new law catalogers.

Looking at the Big Picture

Yael is a tireless and passionate advocate for "looking at the big picture:" Don't just complain—try to fix the problem, at the network and national (even international level) if possible—rather than just tweaking your OPAC. "Looking at the big picture" applies not just to record creation and revision, but also to cataloging policies and standards.

Spatchcocking

Closing on a personal note: In addition to all her other formidable skills and accomplishments, Yael is an expert at "spatchcocking" helpless birds. For those non-cooks among you, don't get alarmed, a "spatchcock" is defined in Wikipedia as "poultry or game that is prepared for roasting or grilling by removing the backbone and sternum of the bird and flattening it out before cooking."

Congratulations, Yael!

TSLL Annual Report
Covering July 2010-July 2011

TSLL volume 36 had four issues, published in PDF format, and is available on the *TSLL* website at http://www.aallnet.org/sis/tssis/tsll/, and on HeinOnline at http://www.heinonline.org/HOL/Index?index=lcc/tsll&collection=journals. Virginia Bryant completed her third year as *TSLL*'s editor-in-chief grateful for the continuing excellent assistance provided by Cindy May, associate editor; Julie Stauffer, layout and design; and Martin Wisneski, web manager. Each issue was available on schedule thanks to the dedicated columnists and the conscientious *TSLL* staff who consistently met their deadlines. Thanks are also due to the faithful *TSLL TechScans* blog contributors who've posted over 75 entries since July to keep readers informed about the latest trends and technology tools.

This year *TSLL* weathered a major columnist change with Marie Whited's retirement in December 2010. For the past sixteen years Marie co-authored or contributed her extensive knowledge on classification to the column. *TSLL* was indeed fortunate to have Lia Contursi agree to step in, and without missing an issue she and Kate Wilko provided an excellent "Classification" column on international criminal law and procedure. Several other columnist changes occurred throughout the year. Yuxin Li as incoming chair of the OCLC Committee wrote the "OCLC" column. The vacant "Serials Issues" column was filled in December 2010 by Chris Hudson, and in June *TSLL* welcomed Allison Rainey as columnist for "Private Law Libraries," which became vacant with Beth Holmes's resignation. There will be some upcoming columnist changes. *TSLL* is indeed sorry to lose Courtney Selby's take on collection development, but we congratulate her most heartily on her move to the directorship of Deane Law Library, Hofstra University Law School. Beginning with the December issue Karen Nuckolls will assume the "Collection Development" column. For the past two years, readers have certainly appreciated the sage advice offered by Karen Douglas, who has decided to step down as columnist for "Management." *TSLL* thanks Karen for her insightful contributions.

In addition to the regular columns, volume 36 also offered several special articles. Topics included institutional repositories and technical services, implementing the Durham Statement with digital archiving, and providing library services via cloud computing. The September issue featured program reports from AALL's Annual Meeting in Denver, Colorado, for which sixteen volunteers reported on programs they attended. The editor continues to urge more use of *TSLL* as a venue for sharing information among the TS-SIS and OBS-SIS membership. If your technical services department has taken on new responsibilities, or changed cataloging procedures to implement *RDA*, or you've embarked on a sabbatical, etc.—tell us all about it!

Last year's annual report noted that AALL signed a three year agreement with Hein to include *TSLL* in *HeinOnline*. Hein added *TSLL* to its "Law Journal Library," but to take advantage of its much improved indexing it is best to search *TSLL* in Hein's "Law Librarian's Reference Library" using the advanced search option.

The *TSLL Structure and Policies* document was revised and brought up-to-date this year, prompted by the committee reviewing TS-SIS's handbook, which has a section covering *TSLL*. Changes in the document were reviewed and approved by the *TSLL* Editorial Board and the Executive Boards of both TS-SIS and OBS-SIS in February 2011. *TSLL Structure and Policies* is available on the *TSLL* website at http://www.aallnet.org/sis/tssis/tsll/policies/, and both TS-SIS and OBS-SIS are linked to the document so any future revisions need only to be made in one place. *TSLL Stylistic Conventions* and the *TSLL Author Guide* were revised in April 2011 and appear on the *TSLL* website as well.

My thanks to Jim Mumm, Ellen McGrath, Janet Hedin, and Gwen Gregory who've served on the *TSLL* Editorial Board with me for the past three years. It's been my pleasure to work with them, the columnists, the *TechScans* contributors coordinated by Corinne Jacox, and the *TSLL* staff. I especially want to thank Cindy May for her superb contributions to *TSLL* for the past thirteen years, first as business manager and current associate editor extraordinaire.

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

Minutes

Technical Services Special Interest Section
2011 Annual Business Meeting
July 24, 2011—Philadelphia, PA

Call to Order

Pam Deemer called the meeting to order at 5:30 p.m. and Elaine Bradshaw verified the quorum.

Welcome and Announcements

- Pam Deemer announced that the evaluation survey is available on the TS-SIS website. She also reminded everyone to fill out evaluations for the TS-sponsored programs.
- The TS-SIS silent auction is at the TS table in the exhibit hall. Proceeds will go to the Marla Schwartz fund.
- The New Catalogers Roundtable will start early in order to allow attendees to also go to the Hot Topic program.

Approval of Minutes of Last Business Meeting

Wendy Moore moved to accept the minutes from the July 11, 2010 business meeting in Denver. The motion was seconded and approved.

Secretary/Treasurer Report – Elaine Bradshaw

Secretary/Treasurer Elaine Bradshaw reported that as of the May 31, 2011 statement, TS-SIS had a balance of $15,766.84. The May 2011 TS-SIS election had a 26% participation rate. The newly elected officers are: Miriam Childs, vice chair/chair-elect; and Richard Paone, member-at-large.

Chair Report – Pam Deemer

Pam Deemer made an addition to her previously posted report. She attended the SIS Council meeting, where they discussed working on communication between AALL and the SIS Council. Many SIS's are working on strategic plans.

Vice Chair/Chair-Elect Report – Ismael Gullon

Incoming chair Ismael Gullon announced that James Mumm has been appointed as Education Committee chair. The Education Committee met July 24, and is ready to help anyone who wants to write a proposal for Boston. This year TS-SIS sponsored six AMPC-approved programs, plus four additional programs.

Members-at-Large Reports

- Katrina Piechnik reported that the Alphabet Soup Reception was a success.
- Suzanne Graham encouraged everyone to fill out program evaluations.

Standing Committee Chair Reports

Acquisitions Standing Committee – Chair Eric Parker discussed ongoing projects, including plans to update the list of legal publishers that had been on AcqWeb. Ann Robbins, University of Illinois, has begun working on the update. A representative from CRIV will be at the Acquisitions Committee meeting.

Cataloging and Classification Standing Committee – Chair George Prager reported that the committee and its subcommittees have been very active this year.

Preservation Standing Committee – Chair Marilyn Estes had nothing to add to her previously submitted report.

Serials Standing Committee – Chair Shyama Agrawal had nothing to add to her previously submitted report.

Old Business

Chris Long reported on the *TS-SIS Handbook*. All revisions were approved at the TS-SIS outgoing Executive Board meeting earlier today.

New Business

Pam Deemer reported on the Strategic Plan Subcommittee and asked for volunteers. Anyone interested in serving can email Ismael Gullon at gullon_i@law.mercer.edu. Pam has noticed a trend to simplify strategic planning documents.

After August 1, 2011, the TS-SIS electronic lists will cease. The new My Communities TS-SIS list will be auto-populated with our membership, but everyone will still need to sign up.

***TSLL* Report –** Editor-in-Chief Virginia Bryant recognized all those who have contributed to *TSLL*, and gave special thanks to Associate Editor Cindy May. The *TSLL* Board will discuss the possibility of *TSLL* having its own website, since structurally it is under both OBS and TS.

Awards – Committee chair Linda Sobey announced that the Renee D. Chapman Memorial Award was presented to Yael Mandelstam by George Prager and Mary McKee, who lauded Mandelstam's many contributions to technical services, both within AALL and also in the larger cataloging community. This year's Marla Schwartz Grant recipient Jen Richter was recognized. The following 2011 educational grant recipients were also recognized: Rebecca Bearden, Erin Harper, Ashley Moye, Amy O'Connor, Keiko Okuhara, Sarah Pearson, and Lisa Wernke.

Acknowledgements and Investiture of the New TS-SIS Chair

Pam Deemer acknowledged the Executive Board officers and standing committee chairs. She also thanked Virginia Bryant and the rest of the *TSLL* staff, as well as Discussion Forum Manager Alan Keely and Website Manager Martin Wisneski, whom she presented with a plaque of appreciation. She then introduced new TS-SIS chair Ismael Gullon and presented him with the gavel. He in turn presented her with a plaque and gifts in appreciation for her service as chair.

Comments from the New Chair

Ismael Gullon introduced the new TS Executive Board and Standing Committee chairs.

The meeting adjourned at 6:35 p.m.

All officer, committee, and representative reports will be available on the TS-SIS website after the Annual Meeting.

Respectfully submitted,
Elaine Bradshaw
September 13, 2011

MINUTES

Online Bibliographic Services Special Interest Section 2011 Annual Business Meeting July 25, 2011—Philadelphia, PA

Chair Kathy Faust called the business meeting to order at 5:30 p.m.

Officers' Reports

Secretary/Treasurer Karen Selden gave the election and treasurer's reports. Karen summarized a written report that she distributed to audience members. An online election was held from March 1 to 15, 2011 using AALL's electronic voting software. 100 votes were cast from a pool of 307 eligible voters (an approximately 33% return rate). The following officers were elected for the 2011-2012 term:

Vice Chair/Chair-Elect --- Christina Tarr, University of California Berkeley
Secretary/Treasurer --- Barbara Szalkowski, South Texas College of Law

However, the member-at-large race ended in a tie. A special "run-off" election was held from April 1 to 15, 2011, and the result was:

Member-at-Large --- Marjorie Crawford, Rutgers University

Sincere thanks to the other candidates who also stood for office during the 2011 elections: Janet Hedin (vice chair/chair-elect); Calmer Chattoo (secretary/treasurer); and Kerry Skinner (member-at-large).

As of May 31, 2011, the balance of the OBS account stood at $7,451.57. However, this figure does not include the Innovative Interfaces contribution (usually approximately $500 for OBS) toward the 2011 joint reception expenses. The final figure for expenses for the 2010 Annual Meeting in Denver was $2,722.10. This figure includes 3 nights of lodging for the 2010 OBS VIP. Kathy noted that the 2011 OBS VIP lives locally, so no expenses will be associated with his attendance.

The minutes of the 2010 business meeting were approved as published in *TSLL* v. 36, no. 1 (September 2010).

Chair Kathy Faust reported for member-at-large Karen Nuckolls (2010-2012). The joint reception, which took place on Saturday evening at Maggiano's Little Italy restaurant, was well-attended and guests appeared to enjoy both the venue and the food. The food was plentiful and the service very prompt and friendly. Committee member Katrina Piechnik (representing TS-SIS) is credited with finding a wonderful venue that helped make the 2011 reception less expensive than the 2010 reception, which took place in one of the official conference hotels.

Member-at-Large Keiko Okuhara (2009-2011) reported on the OBS activities table. The paperback book exchange continues to be a popular enticement to the table. In addition, the OBS Board decided this year to purchase giveaway items with the OBS name on them for the table. Mini flashlights on key chains in assorted colors were chosen, and the feedback on them was positive. In addition, Keiko provided candy from Hawaii (also very popular), a list of OBS-sponsored programs and meetings, and copies of the updated OBS brochure. OBS also continues the tradition of raffling off a $25 gift card from Amazon.com. The drawing will be held at 1:45 p.m. on Tuesday afternoon, the winner will be notified by email, and the card will be sent directly from Amazon. Keiko also thanked Ellen McGrath and Sally Wambold for staffing the OBS table.

Keiko also spearheaded the update of the OBS brochure during the fall of 2010. The result is a one-page color brochure that looks attractive and contains updated information about OBS. The OBS Board extended many thanks to Keiko for serving as their liaison with AALL Headquarters for this detailed and time-consuming project.

Incoming chair Betty Roeske gave the vice chair's report, noting that she received 37 responses to the annual member survey. She has appointed volunteers to chair all of the committees for 2011-2012.

Committee Reports

Kathy Faust reported as chair of the 2011 Education Committee. The Annual Meeting Program Committee (AMPC) selected three programs that OBS either sponsored or co-sponsored:

A-3: "Library in the Clouds: Cloud Computing and Its Impact on Library Services"
G-1: "Library Operations and the Evolution of the ILS: Backfield in Motion?"
I-1: "*RDA* Test: Law Catalogers' Perspectives (co-sponsored with TS-SIS)"

In addition, OBS self-sponsored Richard Jost's well-received program, "Emerging Technologies and the Library Manager" on Sunday afternoon, and the equally well-received Hot Topic presentation by OBS VIP Steven Bell, "The Public-Technical-Systems Connection: For a Great Library Experience, It Really Matters," on Monday at noon.

Betty Roeske reported as chair of the 2012 Education Committee. The committee will meet at 7a.m. Tuesday to work on current ideas and entertain new ones. The deadline for proposals is September 15, 2011, and the AMPC will continue using program tracks, based on AALL's Competencies of Law Librarianship, to categorize programs. Betty encouraged OBS members to attend the Education Committee meeting or send ideas for programs to any committee member.

Hollie White reported for the Joint Research Grant Committee. No grant applications were received this year, and the committee is concerned that there have been no applications for grants in other recent years as well. In response, the committee continues to explore ways to make the application process easier and spark more interest in the grants. The application deadline was moved to March, and the committee expanded advertising to a wider AALL audience, beyond OBS and TS. At a productive meeting Monday morning, the committee made plans to upgrade its webpage and considered expanding to two application cycles per year.

Yuxin Li reported as chair of the OCLC Committee. Yuxin wrote quarterly OCLC Update columns for *TSLL* and coordinated the 2011 OCLC Update and Roundtable, scheduled for Tuesday morning. The new chair of the OCLC Committee for 2011-2012 will be Karen Selden of the University of Colorado's William A. Wise Law Library. Kathy extended thanks to Yuxin for his service on the OCLC Committee and for serving as chair during 2010-2011. Kathy also announced that the OBS Board would like future OCLC Update and Roundtable sessions to adopt a user group meeting format. The OBS Board has asked new OCLC Committee chair Karen Selden to work with OCLC to make this change.

Michael Maben reported as chair of the Nominations Committee. The other committee members were Ellen McGrath and Corrine Jacox. Six nominees agreed to run for the three positions (vice chair/chair-elect, secretary/treasurer, and member-at-large), and the results of the election are noted above in the secretary/treasurer's report. Pat Sayre-McCoy will chair the committee in 2012.

Kathy Faust announced that Marjorie Crawford will replace Caitlin Robinson as the chair of the Local Systems Committee.

There was no Web Advisory Committee report.

***TSLL* Report**

Editor Virginia Bryant reported highlights of her full report, which is available on the *TSLL* website. *TSLL* published four issues, all on time, during the past year. She thanked all of the columnists and authors for their contributions. Cindy May's position at the University of Wisconsin is changing, which prompts Virginia to find someone who is willing to "intern" or "apprentice" with Cindy to take over her duties as associate editor. Virginia extended thanks to Corrine Jacox for continuing to do such a fine job of coordinating the TechScans team. The *TSLL* Board revised its policy documents this past year, and webmaster Martin Wisneski hopes to create a separate *TSLL* webpage, rather than continue to use the current page, which is linked to the TS-SIS website. As always, Virginia welcomes new authors and article ideas.

Chair's Remarks

Outgoing Chair Kathy Faust thanked the OBS Board and committee chairs for their advice and support throughout the past year. Kathy extended her thanks to outgoing board members Keiko Okuhara (member-at-large) and Karen Selden (secretary/treasurer), and presented each with a beautiful Oregon myrtlewood bowl as a thank you gift.

Kathy announced that the OBS Board has decided to archive OBS candidate statements on the OBS website with each candidate's permission. Because the OBS election is now administered using AALL's balloting software, candidate statements and biographies are not archived as examples for subsequent candidates. Incoming secretary/treasurer Barbara Szalkowski will contact the 2011 candidates to ask their permission to post their statements on this new archive.

In her final act of office, Kathy passed the OBS leadership cap to incoming chair Betty Roeske. Betty then presented Kathy with a token of appreciation for her leadership in the form of a Visa gift card.

New chair Betty Roeske presented concluding remarks. She once again encouraged the membership to attend the Education Committee meeting and/or submit educational program ideas to the committee. Her goal for 2012 educational programming is to emphasize quality over quantity.

Betty adjourned the meeting at approximately 6:15 p.m.

Respectfully submitted,
Karen Selden
August 15, 2011

Announcement from the Committee on Professional Development

The Committee on Professional Development is planning to create a framework for *RDA* training so that all law librarians at all levels can receive instruction in *RDA* through some form of online training, without having to rely on attendance at workshops. This applies to catalogers at major research libraries who need a thorough understanding of the new cataloging code, as well as all other types of technical services librarians, including non-catalogers and cataloging para-professionals.

Managers at this time may be adverse to spending large sums of money on training catalogers. Distance education should be radically less expensive than the *AACR2* implementation training that occurred over thirty years ago.

The Committee will be working with the Library of Congress to develop law-specific training materials. The current timetable for such training is expected to be fall 2012, assuming that Day One of the new cataloging code will be January 1, 2013.

Aaron Wolfe Kuperman, chair of the Committee on Professional Development

Report of the AALL Representative to the ALA Committee on Cataloging: Description and Access 2010-2011, 8 July 2011

ALA Midwinter Meeting, San Diego, Calif., January 2011
ALA Annual Conference, New Orleans, La., June 2011

John Hostage
Harvard Law School Library

The work of CC:DA continued to be focused on *RDA* (*Resource Description & Access*) in the past year. *RDA* is a new cataloging code designed to replace *AACR2*. The *RDA Toolkit* was released a year ago. It is an online, subscription-based resource that contains the text of *RDA* as well as the *RDA* element set, various mappings, workflows, and related resources. The three national libraries in the U.S. (LC, NLM, NAL), assisted by many other libraries, put *RDA* through an extensive period of testing. After evaluating the results of that testing, they announced in June that they intended to implement *RDA* no earlier than January 1, 2013, contingent on a number of improvements being made. In a related move, the Library of Congress announced in May a Bibliographic Framework Transition Initiative discussed at http://www.loc.gov/marc/transition/ to investigate the development of an eventual replacement for the MARC 21 format. Many people believe a new data transmission carrier is necessary to take full advantage of *RDA* and to integrate library data into the wider world of information on the web.

CC:DA continues to study proposals for revisions to *RDA*. At the Midwinter meeting in January it considered two proposals from the AALL representative. One of them was a simplification of the rules of entry for the reports of a single court, available at http://www.libraries.psu.edu/tas/jca/ccda/docs/aall4.pdf. It was approved by the committee and sent on to the Joint Steering Committee for the Development of *RDA* (JSC), which has the final word on the text of *RDA*. The other proposal concerned the rules for certain place names. At the Midwinter meeting the committee indicated it would like to see certain changes in the proposal and sent it back for more work. A new version available at http://www.libraries.psu.edu/tas/jca/ccda/docs/aall3rev.pdf was considered at the annual conference in June. There were still some small changes that were desired by the committee, but the proposal will probably be sent to the JSC soon.

RDA and previous cataloging codes have been concerned only with descriptive cataloging. Subject cataloging has been handled by other processes. However, *RDA* includes a number of placeholder chapters for subject entities to align with the underlying models of *FRBR* (*Functional Requirements for Bibliographic Records*) and *FRSAD* (*Functional Requirements for Subject Authority Data*). Now CC:DA and the JSC are starting to consider how to incorporate these subject elements into *RDA*.

AALL MARBI Representative Report, 2010-2011
July 6, 2011

George Prager
New York University Law School Library

Highlights

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 2011, I attended the MARBI meetings in San Diego held during ALA Midwinter on January 8-9, 2011, as well as the meetings held in New Orleans on June 25-26, 2011, during the ALA Annual Meeting.

Many of the proposals and discussion papers related to the mapping of *RDA* into MARC 21. **Proposal No. 2011-02** added a new field 264, with indicators to differentiate production, publication, distribution, copyright, and manufacture statements, as these are all separate elements in *RDA*. Field 260 will remain valid to accommodate legacy data, and for cases in which it is unnecessary to distinguish among the four types of imprint statements. No action was taken on **Proposal No. 2011-03**, dealing with copyright dates, as copyright dates were included in Proposal No. 2011-02 as amended at the June 2011 MARBI meetings. **Proposal No. 2011-04** broadened the definition of field 377 (Associated language) in the Authority Format, to include not just language of person and corporate body, but also language of family and expression. **Proposal No. 2011-05** broadened field 373 (Affiliation [of a person]) in the Authority Format to include institutions and groups associated with a corporate body. **Proposal No. 2011-06** added a new field 378 to the Authority Format for fuller form of a personal name. Information in this field may be useful for distinguishing one personal name from a similar name or names in the case of conflicts. **Proposal No. 2011-07** approved a new field 368 for use in the Authority Format, which will contain additional corporate body attributes (type of corporate body, type of jurisdiction, or other designation). **Proposal No. 2011-08**, relating to the Bibliographic Format, expanded field 340 (Physical medium), and added new fields 344 (Sound characteristics), 345 (Projection characteristics of projected media), 346 (Video characteristics), and 347 (Digital file characteristics). These characteristics relate to Chapter 3 of *RDA*, and had previously only been mapped to coded values in MARC 21 fields Leader/06, 007/00, and 007/01.

No. 2011-DP05 discussed additional means of identifying medium of performance in the MARC 21 Bibliographic and Authority Formats. Medium of performance terms are currently incorporated as part of subject headings, but have been recognized as a separate facet, distinct from subject headings and genre/form terms. This DP will be brought back as a proposal at the 2012 ALA Midwinter Meeting.

The agenda for the 2011 ALA Midwinter MARBI meetings is available at http://www.loc.gov/marc/marbi/mw2011_age.html.

The minutes for the 2011 ALA Midwinter MARBI meetings are available at http://www.loc.gov/marc/marbi/minutes/mw-11.html.

The agenda for the 2011 ALA Annual MARBI meetings is available at http://www.loc.gov/marc/marbi/an2011_age.html.

The minutes and updated cover sheets for the 2011 Annual ALA MARBI meetings were not yet available as of July 6, 2011.

Summaries of all the 2011 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. All proposals may be changed slightly until the time when they are incorporated into the MARC 21 documentation. Following a summary of all the 2011 MARBI papers, I have discussed several other news items related to MARC 21.

My term as AALL Representative to MARBI concludes after the AALL Meeting in July 2011. It has been my pleasure and privilege to serve AALL in this role. I am pleased to report that Patricia Sayre McCoy, head of law cataloging and serials at the D'Angelo Law Library, University of Chicago, has been appointed as AALL's new MARBI representative for 2011-2013. I am sure that Pat will be a more than worthy successor.

Summaries of 2011 MARBI Discussion Papers and Proposals

Proposal 2011-01: Coding for Original Language in Field 041 (Language Code) of the MARC 21 Bibliographic Format

http://www.loc.gov/marc/marbi/2011/2011-01.html

In the MARC 21 Bibliographic Format, field 041 $h is defined as "Language code of original and/or intermediate translations of text." This subfield is used to record not only the original and/or intermediate languages of main works, but also for recording the original and/or intermediate languages of librettos and accompanying material such as liner notes. Although each 041 $h is supposed to follow the subfield with which it is associated, automated parsing based solely on order can be problematic. In this paper, Online Audiovisual Catalogers, Inc. (OLAC) proposed the following:

1. Redefining subfield $h so that it will contain only the language code of the primary original text/soundtrack regardless of whether the resource is a translation. It would not be required to supply the original language if the resource is not a translation. Since the majority of existing 041 $h subfields represent the original language of the primary work, only a modest amount of database maintenance should be required.
2. Defining new subfields for language code of intermediate translation and language code of the original language of subsidiary materials. Alternately, separate subfields could be defined for the original language of different types of subsidiary materials. The desire is for the coding to enable users to search by original language-- especially useful information in the case of moving image materials.

This proposal passed at the MARBI Midwinter Meeting:

1. $h has been redefined as "Language code for primary content of original." Optionally, original language may be recorded, whether or not the resource is a translation.
2. $k has been defined as "Language code of intermediate translations."
3. $m has been defined as "Language code of original for accompanying materials [other than librettos]."
4. $n was later selected for "Language code of original for librettos."

For further background information on this proposal, please refer to the section on Discussion Paper No. 2010-DP05 in my MARBI report for 2009/2010, or to the discussion paper itself, available respectively at http://www.aallnet.org/sis/tssis/representatives/2010/marbi2010.htm, and http://www.loc.gov/marc/marbi/2010/2010-dp05.html.

Proposal No. 2011-02: *RDA* Production, Distribution and Manufacture Statements in the MARC 21 Bibliographic Format
http://www.loc.gov/marc/marbi/2011/2011-02.html
and:
Discussion Paper No. 2011-DP01: Changes to the MARC 21 Bibliographic Format to Accommodate *RDA* Production, Publication, Distribution and Manufacture Statements
http://www.loc.gov/marc/marbi/2011/2011-dp01.html
and:
Proposal No. 2011-03: Encoding Date of Copyright Notice in the MARC 21 Bibliographic Format
http://www.loc.gov/marc/marbi/2011/2011-03.html

MARC 21 bibliographic coding does not differentiate among statements of production, publication, and distribution: 260 $a and $b are defined as Place of publication, distribution, etc., and Name of publisher, distributor, etc. (Manufacturer already has separate subfields). There is also no separate field or subfield for date of copyright notice, which may appear in 260 $c by itself, or with other dates, such as date of publication. However, these are all separate elements in *RDA*. During the testing period, some catalogers found it difficult to properly apply *RDA* in this area, due to a difference in granularity between *RDA* and MARC 21. The discussion paper presented several options for distinguishing these separate *RDA* elements in MARC 21. These options included:

Option 1. Add a second indicator to field 260 for function of statement ([blank]3**).** Separate 260 fields would be used for publication, distribution, production, and manufacture statements. A value of "blank" would apply for unspecified statements (primarily legacy data).

Option 2. Add separate subfields for each function in field 260 for place, name and date of production, publication, and distribution. Subfields $a, $b, and $c would remain for legacy data, and for cases when the cataloger cannot distinguish which function is involved.

Option 3. Define new fields (264, 266, 267, 268). Field 260 would be retained for legacy data, and for cases when the cataloger cannot distinguish which function is involved.

A new field or subfield was also proposed for date of copyright, depending upon which of the above options were chosen. (Field 542, defined in 2008, would not be suitable because its purpose is to give information on whether or not a resource is legally protected by copyright. The *RDA* copyright element serves a different purpose, as it is simply a statement of copyright notice on the item itself). If a new field were to be defined, it would be somewhere in the 2XX block of MARC fields.

At the MARBI Midwinter 2011 meetings, there seemed to be support for both Options 1 and 3; Option 2 was not popular. The preference of the MARBI Committee seemed to be Option 3, with some in favor of a new fourth option: Adding one new field to accommodate these statements, with each function marked by an indicator value. This discussion paper was brought back as Proposal No. 2011-02 at the 2011 ALA Annual Meeting.

The proposal presented two options: Adding a new field 264 with an indicator to distinguish the functions (the new Option 4 above), and Defining four new fields (Option 3 above). In either option, field 260 would remain valid, both to accommodate legacy data as well as for content standards that do not make a distinction among the functions. The paper also discussed the impact on 008 coding, and suggested a new definition under 008/06 (Type of date publication status) that would be in accord with the proposed changes to the imprint fields. Date "1" would be determined by arranging the types of dates in precedence order and choosing the first one available, with the goal of providing a date in Date 1 whenever possible. For published resources, the precedence order would be: 1 Publication, 2 Distribution, 3 Copyright, 4 Manufacture. For unpublished resources: 1 Production, 2 Copyright.

Proposal 2011-02 generated lengthy discussion at the June 2011 MARBI meetings. Eventually, the MARBI Committee approved the option to add only one new field: 264, with an indicator to designate the function. The proposal was amended to incorporate copyright information (only copyright date) into this field (using 2nd indicator "3," and moving "Manufacture" to 2nd indicator "4"). Therefore, no action was taken on Proposal No. 2011-03 on Copyright, which had presented 3 different options to record copyright date. Here is the new field, as approved:

Field 264 - Production, Publication, Distribution, Copyright, Manufacture Statements (R)

Indicators

First - Sequence of statements

- Not applicable/No information provided/Earliest
2 - Intervening
3 - Current/latest

Second - Function of entity

0 - Production
1 - Publication
2 - Distribution
3 - Copyright
4 - Manufacturer

Subfield Codes

$a - Place of production, publication, distribution, manufacture (R)
$b - Name of producer, publisher, distributor, manufacturer (R)
$c - Date of production, publication, distribution, copyright, manufacture (R)
$3 - Materials specified (NR)
$6 - Linkage (NR)
$8 - Field link and sequence number (R)

Discussion Paper No. 2011-DP02: Additional Elements to Support *RDA* in the MARC 21 Format
http://www.loc.gov/marc/marbi/2011/2011-dp02.html

Proposal No. 2009-01/1 and No. 2010-04 previously defined new attributes for Group 2 FRBR entities (persons, families, corporate bodies) and Group 1 FRBR entities (work, expression, manifestation, item), respectively. These attributes can be recorded as part of the heading, but are separate elements in *RDA* that may also be recorded separately even if they aren't currently needed in a heading. It is useful to record each such *RDA* element in its own field or subfield, in case it later becomes necessary to differentiate the heading from another one that is otherwise identical. For example, field 046 $f may contain birth date, such as 1946 or 19460101. This information may or may not also appear as part of the authorized access point (1XX) on the authority record.

No. 2011-DP02, presented at the January 2011 MARBI meetings, discussed several additional *RDA* data elements that are not well accommodated in the MARC 21 Authority Format. All four parts of the DP were brought back as separate proposals at the June 2011 MARBI meetings (Proposals No. 2011-04, 2011-05, 2011-06, and 2011-07).

Proposal No. 2011-04: Adding Field 377 (Associated Language) for Language of Expression in the Authority and Bibliographic Format
http://www.loc.gov/marc/marbi/2011/2011-04.html

Language of expression (*RDA* 6.11) is a core element when needed to differentiate an expression of a work from another expression of the same work. In our current database models, this information usually appears in authority records, not in bibliographic records. Discussion Paper No. 2011-DP02 (section 2.1) presented two options: Field 041 might be defined in the Authority Format, or Authority field 377 (Associated language) might have its definition broadened to include Language of the expression. (It currently includes only Language of the person and Language of the corporate body). It might also be helpful to add a subfield for the recording of language terms, rather than just codes. Field 377 could more easily accommodate both language codes and language terms. (Language codes are currently used in Bibliographic field 041, but not language terms). The Committee's preference was to broaden field 377, rather than to use field 041. This part of the DP was brought back at the June 2011 MARBI meetings as Proposal No. 2011-04.

Proposal No. 2011-04 presented two options:

Option 1: Revise the definition of field 377 to also include Language of family and expression, but keep the subfields as they are.

Option 2: Revise field 377 as above and add subfield $b for Language term. (Language terms would be used more often for the name of a specific language when the language code is a collective code. For example, "cau", "Caucasian (Other)" is the collective code assigned for any of 18 different Caucasian area languages).

Option 2 was approved by the MARBI Committee, with the substitution of $l (the letter "L") for Language term, rather than $b.

Proposal No. 2011-05: Broadening field 373 (Affiliation) for Associated Institutions in the MARC 21 Authority Format
http://www.loc.gov/marc/marbi/2011/2011-05.html

"Associated institution" (*RDA* 11.5) is a core element for conferences in many cases, and sometimes for other corporate bodies as well. No. 2011-DP02 (section 2.2) suggested that field 373 (Affiliation [of a person]; *RDA* 9.13) be broadened to encompass Associated institution. (Field 373 was previously defined in the MARC 21 Authority Format with Proposal No. 2009-01/1.) Field 510 would not be an option, because *RDA* requires that the data be in the form found on the resource. (Field 510 is a controlled field, defined as "See also from tracing—Corporate name). The MARBI Committee decided at its 2011 ALA Midwinter meetings to broaden the name and definition of this field, as well as the scope of its subfield $a. This DP was brought forward at the annual meeting as Proposal No. 2011-05.

The proposal passed as written. The Library of Congress will broaden the name of the proposal to include groups, and the definition will be revised accordingly (exact wording to be worked out).

Proposal No. 2011-06: *RDA* Fuller Form of Personal Name Attribute in the MARC 21 Authority Format
http://www.loc.gov/marc/marbi/2011/2011-06.html

"Fuller form of name" (*RDA* 9.5) is a core element when needed to distinguish a person from another person with the same name. This information, if included in a heading, is given in $q of the access point, e.g.: *100 1# $a Smith, John A. $q (John Allen).* It might be useful to record this information in a discrete field, regardless of whether it is needed at the time that the heading is created. No. 2011-DP02 suggested a new field 378 for this purpose. This DP was brought back at the June 2011 MARBI meetings as Proposal No. 2011-06.

The proposal passed as amended. Rather than using $a for Fuller form of personal name, subfield $q will be used instead (making life easier for catalogers). The documentation will specify that this field is nonrepeatable, and applies only to the heading in the 1XX (not to 4XX fields). Coding for the new field is shown below:

378 - Fuller Form of Personal Name (NR)
Indicators
First - Undefined
- Undefined, contains a blank
Second - Undefined
- Undefined, contains a blank
Subfield Codes
$q - Fuller form of personal name (NR)
$u - Uniform Resource Identifier (R)
$v - Source of information (R)
$6 - Linkage (NR)
$8 - Field link and sequence number (R)

Proposal No. 2011-07: Additional Corporate Body Attributes for *RDA* in the MARC 21 Authority Format
http://www.loc.gov/marc/marbi/2011/2011-07.html

Type of jurisdiction (*RDA* 11.7.15 and 11.13.1.6) is added to the name of a government other than a city or town when needed to differentiate among access points for two or more governments with the same name. Example:

Preferred name: Cork (Ireland : County)
Type of jurisdiction added as an element: County

Discussion Paper No. 2011-DP02 (section 2.4) suggested the addition of a new field to the Authority Format for Type of jurisdiction. This part of the DP was brought back at the June 2011 MARBI meetings as Proposal No. 2011-07.

The proposal also treats two other categories of attributes covered by *RDA* 11.7 in addition to jurisdiction (11.7.1.5): Names not conveying the idea of a corporate body (*RDA* 11.7.1.4), and: Other designation (*RDA* 11.7.1.6). An example of "Other designation" would be the designation "Seventh Day," for the heading "Church of God (Seventh Day)." While *RDA* allows all three categories of designations to be added to authorized access points, a new field to include this information would be useful as well. Proposal No. 2011-07 offers two options for a new field 368:

Option 1: Define a new field 368 (Other Corporate Body Attribute) with an indicator to identify the type of attribute.

Option 2: Same as above, but using different subfields instead of indicators to identify the type of attribute.

Option 2 was approved as written, and appears below.

Field 368 - Other Corporate Body Attributes (R)
Indicators
First - Undefined
- Undefined, contains a blank
Second - Undefined
- Undefined, contains a blank
Subfield Codes
$a - Type of corporate body (R)
$b - Type of jurisdiction (R)
$c - Other designation (R)
$0 - Record control number (R)
$2 - Source of term (R)
$6 - Linkage (NR)
$8 - Field link and sequence number (R)

Discussion Paper No. 2011-DP03: Identifying Work, Expression, and Manifestation records in the MARC 21 Bibliographic, Authority, and Holdings Formats
http://www.loc.gov/marc/marbi/2011/2011-dp03.html
and:
Report on the RDA/MARC Working Group Discussion of Identifying Entity Types in MARC Records
http://www.loc.gov/marc/marbi/WEMI_report.html

Several earlier discussion papers and proposals have offered ideas on how to identify FRBR Group 1 entities in the MARC 21 formats (2008-DP04, 2008-05/1, 2008-05/2, and 2009-02/3, available from the MARC Development web page: http://www.loc.gov/marc/development.html).

The identification of FRBR entities did not seem vital for the initial implementation of *RDA*. However, since the major testing of *RDA* has been completed, the Library of Congress would like to revisit the issues. Clear identification of type of Group 1 entity should assist in the design of better displays and support for user tasks, as well as facilitating more analysis of record content.

While most institutions are currently using authority records for works and expressions, and bibliographic records for manifestations and items, in the future it is likely that authority, bibliographic, and holdings records will be used to support more varied configurations. Therefore, the DP proposes that a new field 883 (Entity type) be defined in all three formats. Subfield "a" would be used for Primary entity type term (work, expression, manifestation, or item), $b for Primary entity type code ("w" (work), etc.), $n for Cataloger's note, and $2 for Source of term (frbrgroup1). Bibliographic records lacking 883 fields would by default be considered manifestation records; holdings records lacking 883 fields would be considered item records. A note field could be included for the cataloger to explain exceptional circumstances.

Bibliographic records for manifestations would include 245 fields. Bibliographic records for works or expressions would contain a 130 or 240 field, but no 245 field.

At the 2011 Midwinter meetings, this paper generated much spirited discussion. John Attig (Penn. State; audience) advised that we should only use the coding when it can be done cleanly. Our current bibliographic records are broader than just manifestation level (for example, they usually contain some work level information, such as subject headings). Sally H. McCallum (chief, Network Development and MARC Standards Office, Library of Congress) reminded the group that the fields wouldn't be mandatory; their use would be as structural metadata that would facilitate experimentation; the fields are not meant to be displayed or used directly by searchers. John Espley (AVIAC representative from VTLS) added that the VTLS OPAC has been using local fields for these levels for a long time; defining values in MARC 21 for this information would be beneficial. A straw poll indicated that the MARBI Committee and the audience were in favor of having this DP brought back as a discussion paper or a proposal at the 2011 ALA Annual Meeting.

After the 2011 Midwinter meetings, the *RDA*/MARC Working Group had several discussions on this DP, but couldn't come to agreement on whether this paper should be brought back as a proposal. Several in the group (myself included), wanted to bring back the DP as a proposal, but others thought it would be too difficult to correctly assign the codes at this time. Also, the ideas in the paper had been presented in several earlier discussion papers, without becoming successful proposals. Therefore, it was decided not to bring it back again. Instead, a report was written for discussion: *Report of the RDA/MARC Working Group Discussion of Identifying Entity Types in MARC Records.* The report distinguishes between strict and loose entity type definitions, and the problems of both approaches. It suggests that next year, as more use is made of *RDA*, systems experiment with a "local field" such as field 883. Based upon the results of the experimentation, it may become feasible at some point to add this field to the MARC 21 formats, possibly with revised definitions. The report was on the agenda for the June 2011 Annual Meeting, but it didn't come up for discussion.

Proposal No. 2011-08: Treatment of Controlled Lists of Terms for Carrier Characteristics in *RDA* in the MARC 21 Bibliographic Format
http://www.loc.gov/marc/marbi/2011/2011-08.html
and:
Discussion Paper No. 2011-DP04: Treatment of Controlled Lists of Terms for Carrier Attributes in *RDA* and the MARC 21 Bibliographic Format
http://www.loc.gov/marc/marbi/2011/2011-dp04.html

Carrier attributes are noted in the new MARC fields 336-338 as either terms or codes (or both). These attributes are mapped to Leader/06 (Type of record), 007/00 (Category of material), and 007/01 (Specific material designation). Prior to *RDA* implementation, it was decided to use the coded data fields in MARC rather than establish new fields or subfields for carrier attributes. However, based on experiences during the testing of *RDA*, the Library of Congress has suggested that it might be clearer to assign specific MARC fields or subfields for each of the carrier attributes listed in *RDA* (Chapter 3). No. 2011-DP04 presented the following suggestions at the 2011 Midwinter meetings:

1. **Field 340 Physical Medium** (expansion of field; to be renamed: Carrier Characteristics)
   New subfields could be added for the *RDA* elements: Generation, Layout, Book format, Font size, and Polarity.
2. **Field 344 Sound Characteristics** (New)
3. **Field 345 Projection Characteristics of Motion Picture Film** (New)
4. **Field 346 Video Characteristics** (New)
5. **Field 347 Digital File Characteristics** (New)

Other notes pertaining to carrier attributes currently map to MARC 500 notes. This DP suggests that subfield $i could be added for the attribute name. Example: *500 ## $i Mount: $a Mounted on starched linen*

2011-DP04 was brought back as Proposal No. 2011-08 at the June 2011 MARBI meetings. One option presented the same fields as in the DP above (although 345 has been renamed: Projection Characteristic of Projected Media). Another option suggested using a new 34X field with subfields for each of the detailed characteristics. A problem with this option is handling growth in the number of characteristics. Additional suggestions included making 300 $b repeatable, and adding "$i" (Display text) as a new subfield in the 500 field.

The MARBI Commitee approved Option 1, adding new fields 344-347, as well as adding new subfields to field 340 as above. Subfields $6, $8, and $0 (not in the actual proposal) will also be added to 340 and to the new fields 344-347. The other suggestions were not approved.

Proposal No. 2011-09: Identifying the Source of Thematic Index Numbers in Field 383 in the MARC 21 Authority and Bibliographic Formats
http://www.loc.gov/marc/marbi/2011/2011-09.html

Field 383 was previously defined in Proposal No. 2010-04. It provided for the coding of a serial number, opus number, or thematic index number to help distinguish a work from others with the same title. Sometimes different indexes for the same composer use different serial and opus numbers to represent the same composition. For additional clarification, No. 2011-09 proposes $d (Thematic index citation code), $e (Publisher associated with serial or opus number), and $2 (Source code). $2 will be especially useful, as the Music Library Association has recently developed an authoritative compilation of citations for thematic indexes entitled: *Thematic indexes in the Library of Congress/NACO Authority File*. This proposal passed as amended, the most notable change being that $e will only be for publisher associated with opus number, not also publisher associated with serial number.

Proposal No. 2011-10: Geographic Codes in Classification Records
http://www.loc.gov/marc/marbi/2011/2011-10.html

This Paper proposes adding fields 034 (Coded Cartographic Mathematical Data) and 043 (Geographic Area Code) to the MARC 21 Classification Format to characterize geographic headings. Both fields would be useful for providing access to classification records. These fields already exist in the Bibliographic and Authority Formats. This proposal passed as amended, with $0 also added.

Proposal No. 2011-11: Addition of Indicator Value 7 (Other edition specified in $2) in DDC Number Fields in the MARC 21 Bibliographic, Authority and Community Information Formats
http://www.loc.gov/marc/marbi/2011/2011-11.html

Currently, fields 082 and 083 only contain values for full and abridged editions of the Dewey Decimal Classification (DDC). These values are not applicable to some editions of DDC, such as Norwegian DDK 5, a translation not directly derived from the English language standard edition. Therefore, a means to record other values is needed. This proposal was approved as written at the June 2011 MARBI meetings.

Proposal No. 2011-12: Defining Subfield $q for an Assigning Agency in Field 084 (Other Classification Number) of the MARC 21 Bibliographic Format
http://www.loc.gov/marc/marbi/2011/2011-12.html

This new subfield was proposed in order to distinguish the assigning agency of a particular 084 field when more than one 084 field has been assigned to the same record, as is sometimes the case with records emanating from the German National Library. At the June 2011 MARBI meetings, this proposal was approved as written.

Discussion Paper No. 2011-DP05: Additional Means of Identifying Medium of Performance in the MARC 21 Bibliographic and Authority Formats
http://www.loc.gov/marc/marbi/2011/2011-dp05.html

Many Library of Congress subject headings for music combine medium and genre/form terms. Example: *Sonatas (Flute and piano)*. It is now recognized that medium of performance is a facet of musical works that should be separate from both subject headings and from genre/form terms. Therefore, when genre/form terms for music are implemented, LCSH headings with medium terms in them will no longer be valid to assign to music. Medium of performance terms will need to be contained elsewhere in the MARC 21 record. This DP presents three possible MARC fields that might be suitable for medium of performance. The 048 field (a coded field, already in the Bibliographic Format, but not yet in the Authority Format), 382 (Medium of performance, currently used to differentiate expressions), or a new 6XX field in the Bibliographic Format (requiring also a new 1XX field in the Authority Format). Each of the fields would have advantages and disadvantages. During discussions at the June 2011 MARBI meetings, there was little support for the 048 option, but no clear preference expressed for the other two options. This DP will be brought back as a proposal, with links provided to examples.

Other MARC News

Transforming Our Bibliographic Framework

Deanna B. Marcum, associate librarian for library services at the Library of Congress, will be leading a new initiative "to analyze the present and future [bibliographic] environment, identify the components of the framework to support our users, and plan for the evolution from our present framework to the future—not just for the Library of Congress, but for all institutions that depend on bibliographic data shared by the Library and its partners." Two issues in the initiative are directly related to the future of the MARC 21 formats:

- *Determine which aspects of current metadata encoding standards should be retained and evolved into a format for the future. We will consider MARC 21, in which billions of records are presently encoded, as well as other initiatives.*
- *Explore approaches to displaying metadata beyond current MARC-based systems.*

The initiative was announced in the statement: *Transforming our Bibliographic Framework: A Statement from the Library of Congress (May 13, 2011)*. The full text is available at http://www.loc.gov/marc/transition/news/framework-051311.html.

On June 20, 2011, the *Report and Recommendations of the U.S. RDA Test Coordinating Committee* was made publicly available. One of the recommendations of the report was to "Demonstrate credible progress toward a replacement for

MARC" within an 18-24 month timeframe. The report is available at http://www.loc.gov/bibliographic-future/rda/rdatesting-finalreport-20june2011.pdf.

MARC 21 Update No. 12 Available Online

MARC 21 Update No. 12 (October 2010) was made available in late 2010 from the MARC Standards home page (http://www.loc.gov/marc/). Changes to the documentation resulted mainly from MARBI proposals that were approved at the 2010 ALA Midwinter and Annual meetings. The update has been integrated into the documentation for each of the online full and concise formats that are maintained on the MARC website. The changes to the formats are indicated in red. Appendix G of the Bibliographic Format, and Appendix F of the Authority and Holdings Formats, give a list of all the changes made in Update 12. The major change to the Bibliographic Format was the introduction of a new code "c" in Leader 18, used for "ISBD Punctuation only," and the change in definition and description of code "i" "ISBD punctuation included," also in Leader 18. Another significant change in several formats was the change in definition of $0 from "Record control number" to "Authority record control number or standard number."

RDA in MARC

The document *RDA in MARC* continues to be regularly updated with approved and proposed changes to MARC 21. It is available at http://www.loc.gov/marc/RDAinMARC29.html (last updated June 14, 2011).

Report of the AALL Representative to the ALA Subject Analysis Committee

ALA Midwinter Meeting, San Diego, Calif., January 2011
ALA Annual Meeting, New Orleans, La., June 2011

Yael Mandelstam
Fordham Law School Library

This report marks the end of my second and final term as the AALL representative to SAC. I find it difficult to believe that six years have passed so fast! I very much enjoyed these stimulating and productive years and plan to remain active on the SAC Subcommittee on Genre/Form Implementation. I wish my successor Ellen McGrath the best of luck and am looking forward to her reports.

Following is a summary of SAC activities in 2011 and highlights from the Library of Congress ALA reports.

Two SAC subcommittees were disbanded at ALA Annual: the SAC Subcommittee on FAST (Faceted Application of Subject Terminology) and the SAC Faceting Task Force. Issues regarding faceting will continue to be discussed at the new Faceted Subject Access Interest Group of the ALCTS Cataloging and Classification Section (recently renamed Cataloging and Metadata Management Section).

Preconference on Genre/Form

SAC sponsored an ALA Annual preconference called, "*What is it, anyway? Library of Congress Genre/Form Terms for Library and Archival Materials.*" The workshop introduced participants to the principles and application of Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT). Janis Young, the LC Genre/Form Coordinator at LC Policy and Standards Division (PSD), covered the theoretical and practical aspects of LCGFT; Beth Iseminger from Harvard University spoke about the music genre/form project at the Music Library Association (MLA); and I spoke about the development of the law genre/form terms at AALL.

SAC Subcommittee on Genre/Form Implementation

Shortly before ALA Annual, the SAC Subcommittee on Genre/Form Implementation approved the recommendations of the 185/155 Working Group. The group was formed in 2010 and charged with reviewing all current *LCSH* form subdivisions in 185 authority records and identifying terms of general applications that could be recommended for inclusion in the LCGFT. The group's recommendations were submitted to SAC and if approved, will be submitted to PSD.

The subcommittee has also been working on possible treatments of various "facets" or "aspects" associated with genre/form terms (since subdivisions are not allowed in LCGFT). Facets include class of creator and intended audience (e.g., gender, occupation, age group, ethnicity, nationality) as well as place, language, religious denomination, etc. Each member of the subcommittee prepared a report on one or more of these aspects, and the reports and potential recommendations were discussed at ALA Annual. The subcommittee will continue its discussions electronically and hopes to submit its recommendations to SAC by ALA Midwinter.

SAC Subcommittee on RDA

This new subcommittee was formed at ALA Midwinter to address subject-related issues in *RDA*. The Joint Steering Committee for Development of *RDA* (JSC) is moving forward with the subject-related chapters of *RDA* and it was important to set in place a mechanism for ALA to respond to JSC proposals and papers, since subject analysis issues are not under the purview of the Committee on Cataloging: Description and Access (CC:DA), and SAC is not formally charged to respond to the JSC. To resolve this issue ALCTS created the new position of a SAC liaison to CC:DA (who also acts as chair of the SAC Subcommittee on *RDA*). SAC will be the decision-making body for formulating the ALA responses, and the decisions will be communicated to CC:DA.

SAC and CC:DA members and liaison had a joint meeting at ALA Annual. John Attig, the ALA representative to JSC, gave a presentation about subject entities and relationships in *RDA*, and Gordon Dunsire spoke about the treatment of subject in each of the Functional Requirements models: *Functional Requirements for Bibliographic Records* (*FRBR*), *Functional Requirements for Authority Data* (*FRAD*) and *Functional Requirements for Subject Authority Data* (*FRSAD*). Following the presentations was a brief discussion of the LC discussion paper on the "placeholder" chapters in *RDA* for Group 3 entities (Concept, Object, Event, and Place) and "subject."

Highlights from reports submitted by Janis Young, the liaison from the Library of Congress Policy and Standards Division. The full LC at ALA report is available at http://www.loc.gov/ala.

SUBJECT CATALOGING AND CLASSIFICATION

Publications. New editions of *LC Classification Schedules*: E-F (History, America), M (Music and Books on Music), N (Fine Arts), PN (Literature, General), T (Technology), K Tables, and P-PZ Table. In July a new print edition of D-DR (History, General) and History of Europe will be published, as well as a new edition of *JZ and KZ: Historical Notes and Introduction to Application*. The 33rd edition of *LCSH* will also be available in July.

Classification Web. A number of enhancements to *Classification Web* were being tested at the end of 2010. They included the addition of personal names from the LC/NACO authority file, expansion of the correlations feature to provide correlations between the National Library of Medicine classification and LCC, a new design, improved navigation tools, and an updated help file.

Staffing Change. Paul Weiss, the cataloging policy specialist who was responsible for subject headings and classification in the social sciences, law, and philosophy, retired in February after 37 years of service to the Library of Congress. There are now three subject specialists in PSD: Libby Dechman, Gerry Ostrove, and Janis Young. Gerry is responsible for music, and Libby and Janis handle all of the other subjects with the assistance of Tom Yee, the assistant division chief.

New Subject Heading Proposal System. PSD will implement a new system for creating online subject proposals no earlier than July 18, 2011. This new system is similar to the classification proposal system and will uses the same login and password currently used for classification proposals. It should streamline the process for proposing new and revised subject and genre/form headings.

Tentative Lists. Effective with classification and subject headings weekly list 1121 (dated June 15, 2011), the Policy and Standards Division changed the frequency of the tentative and the approved weekly lists to a monthly schedule. This is an experimental change and may be revised as circumstances dictate. The upcoming implementation of a new system for creating subject heading proposals, similar to the current system for making classification proposals, makes this an opportune time to realign workflows to increase efficiency in all division operations. The review process for proposals has not changed.

KZ7000-7500. PSD has implemented a new schedule, KZ7000-KZ7500, International criminal law, following up on the development of this distinct sub-discipline of international law. The new classes in this schedule closely follow the principles and doctrines of international criminal law. The focus of the new schedule is on the International Criminal Court (ICC) established by the Rome Treaty (1998/2002) as well as the procedures governing the international investigation and prosecution of conduct viewed by the international community as international crimes. The widening catalog of crimes against humanity, war crimes, and genocide, forms the center of the substantive development. Hand in hand with the new development, new subject headings were created and older subject headings were revised.

The original and outdated ranges in Class KZ for International criminal courts and procedure, KZ6304-KZ6332, have been closed, as well as the classes for reports, digests, and pleadings of the newly erected court, KZ219-KZ220.2. Furthermore, the original numbers in Class K (Law in general. Comparative law) for those subjects that are governed by international criminal law and under the jurisdiction of the ICC, i.e., genocide, crimes against humanity, and war crimes, have been closed or revised. References have been provided to direct users of the schedules to the new numbers.

A substantial number of titles (mainly monographs), have been reclassed and the works transferred to their new KZ classification numbers. This new classification does not preclude developments on international criminal law, courts and procedure, and prosecution of international crimes in the regional or national law classification schedules if it should become necessary. Updated print editions of K and KZ, as well as the publication, *JZ and KZ: Historical Notes and Introduction to Application* will be available from CDS soon.

Subject Heading Projects. PSD has 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 as follows.

- The Netherlands Antilles, an autonomous country within the Kingdom of the Netherlands, was dissolved on October 10, 2010. The islands of Bonaire, Saba, and Saint Eustatius are now special municipalities of the Netherlands proper. Curaçao and Saint Maarten are constituent countries within the Kingdom of the Netherlands. The dissolution affects jurisdictional qualifiers, broader terms, and scope notes in *LCSH*.
- Late in 2010, PSD was asked to consider reevaluating subject cataloging practice as it relates to Tibet. After consulting with experts in Tibetan studies, the cataloging policy specialists in PSD agreed to revise the name authority headings for the jurisdiction of Tibet and also to establish a new subject heading. The headings and their assignment now conform to international descriptive cataloging rules as set forth in the *Anglo-American Cataloging Rules*, 2nd Edition, and to policies governing the assignment of Library of Congress subject headings as described in the *Subject Headings Manual*.

Tibet (LCCN n2011015804): the governmental jurisdiction of Tibet before September 1, 1965. It may be applied as a descriptive access point to works emanating from or published by the government of independent Tibet. It may not be assigned as a subject heading or geographic subdivision.

Tibet Autonomous Region (China) (LCCN n 79100917): the current province-level governmental jurisdiction within the People's Republic of China that was formalized on September 1, 1965. It may be applied as a descriptive access point to works emanating from or published by the government of Tibet after that date. It may also be assigned as a subject heading for works about Tibet as an independent country and as a jurisdiction within China.

Tibet Region (LCCN sh2011001106): the geographic region of Tibet sometimes referred to as "Greater Tibet." The geographic extent of this region is much larger than the governmental jurisdiction of Tibet. It corresponds to the traditional regions of Ü-Tsang, Ngari, Amdo, and Kham, which are chiefly within the borders of China and also extend into India, Nepal, Bhutan, and Burma.

Tibet, Plateau of (LCCN sh 86005180): the geographic feature. The qualifier "China" has been removed from the existing heading to reflect the extent of the plateau, which is not only in China but also extends into Nepal and India. Geographically, the Plateau of Tibet is similar to, but not coextensive with, the Tibet Region.

HIVE at LC. The Library of Congress launched an experiment this past year to use HIVE (Helping Interdisciplinary Vocabulary Engineering at http://ils.unc.edu/mrc/hive/) to automatically generate subject headings for LC's web archives. The experiment is starting with the public policy web archives. The HIVE software is expected to "learn" relevant vocabulary based on these web pages to offer ever-better suggestions to assist catalogers

GENRE/FORM TERMS

Revision of MARC Coding. On May 24, 2011, more than 700 existing genre/form authority records were cancelled and reissued with new MARC coding. LCGFT authority records now have an 008/11 value of "z" (other) and an 040$f value of "lcgft." PSD also took this opportunity to change the LCCN prefix in the records to "gf" from "sh." The revised MARC coding will enable automatic validation of LCGFT terms applied in bibliographic records, and the new LCCN prefix is an additional marker indicating that the terms are from the new thesaurus.

The revision to the MARC coding also required that the coding of LCGFT terms in bibliographic records be updated. As of May 24 the correct coding is:

655 #7 $a [term]. $2 lcgft.

PSD has begun to undertake the bibliographic file maintenance necessitated by this change and expects to complete it before the end of 2011.

Cartography Project. Approximately 65 cartographic genre/form terms were approved in mid-May and the *LCSH* form subdivisions used for maps were revised on August 18, 2010. LC implemented the new genre/form headings and revised subdivisions on September 1, 2010. PSD is beginning to draft an instruction sheet on the application of genre/form terms for cartographic materials. SACO proposals are now being accepted.

Law Project. In November 2010, PSD approved approximately 80 genre/form terms for law. This marked the culmination of a successful partnership between PSD and the American Association of Law Libraries (AALL), whose members developed a thesaurus of law genre/form terms and presented it to PSD for inclusion in LCGFT. On June 15, 2011 the Library of Congress began to apply law genre/form terms to new cataloging, chiefly for English-language works. LCGFT terms for law that appear on copy cataloging will be retained and/or revised as necessary, in accordance with LC's standard copy cataloging procedures.

Music Project. The Music Library Association (MLA) has partnered with PSD to develop genre/form terms in the area of music. The parties have agreed to a list of more than 1,000 genre/form terms and are now developing the syntactic structure. They are also developing a list of mediums of performance and discussing where the mediums should be coded within the MARC record, since they will not be included in LCGFT. In support of this project, MLA's Subject Access Subcommittee has presented a MARC discussion paper entitled, "Additional means of identifying medium of performance in the MARC 21 bibliographic and authority formats." Numbered 2011-DP05, it is on MARBI's agenda for this conference.

Religion Project. The American Theological Library Association (ATLA) and PSD have partnered to develop the genre/form terms in the area of religion, and ATLA is also coordinating the participation of smaller library groups organized around religion, such as the Catholic Library Association. ATLA has created a wiki for interested parties to suggest terms and discuss issues related to them.

OCLC Update and Roundtable

Yuxin Li
University of Houston Law Library

The number of people who attended the OCLC Update and Roundtable session at the 2011 AALL Annual Meeting in Philadelphia was far from overwhelming. I think the major reason was that the TS-SIS hot topic program on *RDA* was held in the same time block. I hope that next year's scheduling will avoid such a conflict.

Carole Myles, OCLC member services consultant, gave the presentation with the following major topics:

Good Practices for Great Outcomes — Carole highlighted OCLC's growth from its establishment up to now. 2011 marks the 44th year of the OCLC cooperative and the 40th anniversary of the WorldCat database. From the original 54 libraries in Ohio, there are now more than 72,000 participating libraries in 170 countries. WorldCat includes over 230 million records in over 470 languages. Eleven years ago, 36 percent of WorldCat records were non-English; today, that number has risen to 53.8 percent.

New OCLC governance structure — This past year, the OCLC cooperative completed its transition to a new governance structure. A member of the OCLC cooperative is any library, archive or museum that contractually agrees to contribute intellectual content to the OCLC cooperative or share resources with it. A member can participate in governance of the OCLC cooperative through one of three Regional Councils: OCLC Asia Pacific; OCLC Europe, the Middle East and Africa (EMEA); or OCLC the Americas. The Regional Councils send Member Delegates to the Global Council, which in turn elects six members of the OCLC Board of Trustees. Nine of the current sixteen board trustees are librarians.

U.S. prices frozen — OCLC will continue to freeze prices in core services in North America for the coming fiscal year. This is the third year in a row that OCLC has held the line on prices.

Library Automation Costs and **Web-scale Management Services** — In 2010, the estimated cost for supporting an array of systems to support workflow for print, licensed and digital materials was around $630 million. OCLC believes that web-scale library management systems (WMS) can help reduce costs. Pepperdine University Libraries and St. Thomas University Law Library have implemented WMS.

Connexion client version 2.30 — OCLC released Connexion client 2.30 in April 2011. It includes enhancements to existing functionality and is compatible with both 32-bit and 64-bit versions of Microsoft Windows. All Connexion client users will be required to upgrade to version 2.30 within six months of its release.

In addition, Connexion now includes links to the *RDA Toolkit*. *RDA Toolkit* subscribers can save their authorizations and passwords in Connexion. When highlighting a bibliographic or authority record field, selecting the *RDA Toolkit* link will result in the *RDA Toolkit* opening in a browser window, logging onto the system, and displaying the *RDA* content associated with the specific MARC field. Note that a subscription to the *RDA Toolkit* is required to use this feature. This functionality is available in both Connexion client 2.30 and in Connexion browser as of May 15, 2011.

***RDA* and OCLC** — OCLC has participated actively in *RDA* development through its ex-officio membership on the ALA Committee on Cataloging: Description and Access and its representation on the MARC Advisory Committee. OCLC staff are also participating in the Joint Steering Committee's two *RDA* Examples Groups and the *RDA*/MARC Working Group, which is preparing proposals for MARC 21 format change in support of *RDA*. In addition, OCLC is represented on the ALA *RDA* Implementation Task Force, which is planning for U.S. implementation, and has participated in program sessions sponsored by the Task Force. OCLC staff also joined staff from the three U.S. national libraries in discussions and planning for the testing/evaluation period which ran from September through December 2010. Cataloging staff in OCLC's Metadata Contract Services participated in the testing.

OBS-SIS/TS-SIS Joint Research Grant Committee 2010-2011 Annual Report

Hollie White
University of North Carolina at Chapel Hill

This past year the Joint Research Grant Committee (JRGC) continued its work to make the grant application process easier for applicants. With both OBS and TS Executive Board approval, the official application deadline was changed to March 31. A new reference form was also added to the website. To promote these changes, the December issue of *TSLL*'s "Research and Publications" column featured an article on this topic. Advertising this year expanded to include a blurb in the February *Spectrum* as well as mentions in both the February and March issues of the AALL President's online newsletter. The committee also posted multiple messages on both the TS and OBS discussion lists.

Despite all these advertising efforts, no one applied for the Joint Research Grant this year. The JRGC has come up with some new ideas for getting members to apply. An informal educational program on how to conduct technical services-focused research will be included in the OBS/TS Researcher's Roundtable in July. Other suggestions include conducting an online survey of OBS/TS members to find out why they are not applying for the grant, and creating a rolling deadline for submissions (i.e., if no one applies in the spring, open up a fall application process.)

TS-SIS Acquisitions Committee 2011 Committee Meeting and Roundtable Minutes

Earlene Kuester
Stetson University, Hand Law Library

The TS-SIS Acquisitions Committee Business Meeting was called to order on Monday, July 25, 2011 at 7:00 a.m. at the Philadelphia Convention Center, Room 105(B), by Chair Eric Parker, acquisitions librarian at Northwestern University Pritzker Legal Research Center.

A motion was made, seconded and carried to approve the minutes of last year's meeting. Attendees introduced themselves and a sign-up sheet was passed around.

Old Business

List of law publishers in ACQWEB
Eric got an email from Anne Robbins, who has maintained the TS-SIS Acquisitions Standing Committee legal publishers list this last year. She has set up a mock blog to meet the criteria to update the list. She needs people to add publishers. There is a user's guide, an A-Z list of publishers and a search box. Eric asked for volunteers to help Anne. Eric, Wendy Moore, and Ajaye Bloomstone volunteered. Anne asked for input on how large to make the comments section. Eric suggested that they work on the website for several months and then turn it over to the TS-SIS webmaster, who might be able to link to it from the TS-SIS website. The address is http://legal-acquisition-forum.blogspot.com/p/legal-publisher-list.html.

Collection development policies
Collection development policies are currently accessible online using the ALL-SIS password, not the regular AALL password.

Is there a better solution? Ismael Gullon suggested using the TS-SIS embedded password instead of the ALL-SIS password. Eric will ask the TS-SIS webmaster if that can be done.

Report from and Q & A with CRIV incoming Chair Shaun Esposito

CRIV has a chair, vice-chair, nine members and a non-voting Executive Board liaison. Their mission statement is on the AALL website. The committee's goals are education and advocacy. They help with complaint resolution and publish the *CRIV Sheet*. CRIV tools are available and there are suggestions for dealing with vendors. The Committee selects a product for the Best New Product Award. They sponsor a vendor roundtable and colloquium held today in room 111(B) at 12:15 p.m. They propose programs for the annual meeting and are looking into presenting webinars. The committee encourages vendor compliance with the *AALL Guide to Fair Business Practices for Legal Publishers*. In the coming year, the committee will be working with the new AALL vendor liaison. They are not sure just how CRIV will work with the liaison. The liaison is the chair of the Vendor Colloquium Working Group. The chair will take suggestions to the AALL Board & CRIV will help implement them & look at new products. If you have a complaint with a vendor, complete the form on the CRIV website or email Shaun directly. Last year CRIV handled sixteen major complaints.

New Business

Eric asked for ideas for 2012 programs. The AMPC deadline is September 15 but the TS-SIS Education Committee's is August 15. The Education Committee is willing to work with members on program proposals. Contact Education Committee chair Jim Mumm.

Ajaye Bloomstone suggested several ideas for programs:

An in-depth program on *RDA* training
Usage statistics for electronic packages
Law for technical services librarians without JDs

If members are interested in speaking at one of these programs, contact Ajaye.

The Business Meeting was adjourned at 7:42 a.m.

Roundtable Meeting

The Roundtable Meeting began at 7:43 a.m. Each attendee gave a "state of my library" report.

Eric proposed a survey on what libraries have done to cope with budget cuts and cancellations. He did a survey in his area for collection development purposes. Ajaye suggested that it be put into a Google Docs spreadsheet. Wendy Moore suggested Survey Monkey. Eric will share his survey with the list of attendees and members. Shyama Agrawal and Damon Campbell volunteered to help.

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

TS-SIS Preservation Standing Committee
Philadelphia, July 26, 2011

Sharon Bradley
University of Georgia School of Law

I. Welcome & Introductions from the Chair Marilyn Estes.

II. Sharon Bradley volunteered to take minutes.

III. Subcommittee Reports

Due to a lack of members present, there were no subcommmittee reports. All SIS members are encouraged to volunteer for these subcommittees. The work is never onerous, and the work of the subcommittees helps the chair get things done.

IV. New Resources

- Washington College of Law uses Digital Commons for faculty papers; found cache of historic graduation programs
- Lurawave (http://www.luratech.com/products/imaging-solutions.html) image server from Luratech

- Association of Moving Image Archivists (http://www.amianet.org/) a good resource for preserving videos
- Lyrasis Mass Digitization Collaborative (http://www.lyrasis.org/Products-and-Services/Digital-Services/Mass-Digitization-Collaborative.aspx) recommended for large projects
- Rae Best, Librarian for the U.S. House of Representatives, gave a presentation on scanners that was recommended.

V. Old Business

Our website will be migrating into AALLNet. Double check links, and save any documents.

VI. New Business

2012 Annual Meeting program proposals

- There is a handout at the activities table with more information; the submission deadline is Sept. 15. The proposal site is http://proposals.aallnet.org/. Be sure to use "share" option on proposal form to get input from the committee or even the whole SIS.
- Marilyn Estes passed the gavel to Sally Wambold.

VII. New Chair's Remarks

- "PreservationUpdates" is a Yahoo group (http://groups.yahoo.com/group/PreservationUpdates/).
- Sally encouraged the committee to establish a presence in *AALL Spectrum* by writing articles on preservation. She also suggested that everyone think about writing for the *Spectrum* blog (http://aallspectrum.wordpress.com/). This may be less intimidating, as the articles are shorter, and can be more conversational in style.
- Sally would like someone to take over the preservation column in *Technical Services Law Librarian*. The next column would not be until the Feb. 2012 issue. Topics have included new products, and useful links. The columnist does not always have to write the column, but can invite guests and then coordinate the submissions. [*Editor's note: The new preservation columnist has since been selected.*]

TS-SIS Rare Book Cataloging Roundtable Report Philadelphia, July 24, 2011

Sabrina Sondhi
Arthur Diamond Law Library,
Columbia University

The Rare Book Cataloging Roundtable met for the fifth successive year in July at the Annual Meeting in Philadelphia. Sarah Yates, Roundtable chair and cataloging librarian at the University of Minnesota Law Library, led the TS-SIS sponsored meeting which was well attended, in spite of its being scheduled at the same time as the Legal History and Rare Books SIS awards luncheon.

One of the major topics of discussion this year was whether *Resource Description and Access* (*RDA*) was suitable for rare book cataloging. The consensus was that it was not; after all, the DCRM(B) which is designed for cataloging rare books is still relatively new. The DCRM(B) also allows for a greater level of rare book-related detail and specificity than *RDA* would currently allow. Since *RDA* is still evolving, it was pointed out that the rare book cataloging community may eventually implement complementary *RDA* rules. However, most of the roundtable participants did not foresee this happening in the near future.

Another popular topic of conversation was genre terms. Most participants agreed that the growing use of genre terms will help patrons rediscover libraries' "hidden collections." However, several librarians admitted that their libraries used only a chosen subset of genre terms, if they decided to use genre terms at all. This means that copy cataloging records are not a viable method of adding these fields. In libraries with large collections there is also the question of how genre terms should be applied to already-cataloged materials. At one major library, genre terms are being added to newly-cataloged materials, but those fields are being suppressed until the point at which terms have been assigned to a significant portion of the collection. At another major library, the reference librarians will be choosing a selected few genre terms, and the catalogers will use global update to apply each individual term to materials.

Some general discussion was also held about cut-off dates for including items in special collections. This date varies by library. Some libraries also applied different cut-off dates for different purposes, e.g., pre-1850 for locating a book in special collections, but pre-1800 for cataloging a book with DCRM(B).

As happens most years, the group also had the opportunity to share news about new cataloging tools, training workshops, online presentations, and recent journal articles of interest. The rare book cataloging mailing list is set to be repopulated on the new AALL platform; to be added to the list, or for more information, contact Sarah Yates at yates006@umn.edu.

TS-SIS Serials Standing Committee 2011 Committee Meeting Report

Christine K. Dulaney
American University, Pence Law Library

Introduction

Shyama Agrawal opened the meeting on Tuesday, July 26, 2011 at 7:00 a.m. and had attendees introduce themselves.

Announcements

- Incoming Serials Standing Committee chair, Wendy Moore, was introduced.
- Jim Mumm, TS-SIS Education Committee chair, outlined the process for proposing programs for next year's Annual Meeting. August 15 is the deadline for proposing a program to TS-SIS for review and revision. September 15 is the deadline for proposing a program to AMCP. Competition is stiff, so proposals need to be well-developed. The Education Committee assigns liaisons to assist in preparing proposals. A Serials Committee member who had worked with the Education Committee in the past to prepare a program proposal found the process instrumental in getting her proposal approved. She encouraged members to submit proposals.
- Shyama Agrawal reviewed all TS-SIS programs for the day.

Old Business

Exchange of Duplicates program
Pat Roncevich, Exchange of Duplicates program leader, commented on the difficult transition in leadership for this program. This year two exchanges were conducted and updated information was submitted for the *TS-SIS handbook*.

Project COUNTER Task Group

- Lorna Tang, Project COUNTER Task Group leader, reviewed progress to date. She noted that a 35 percent discount is offered to smaller publishers to encourage participation.
- Update on COUNTER Code of Practice status
    - Release 4 of the COUNTER Code of Practice is in draft form and scheduled to be published in March 2012, with an implementation deadline of December 31, 2013.
    - Publishers will be audited for compliance.
    - COUNTER is conducting a study to quantify journal quality.
    - The Release 4 compliance deadline for those who have been audited is 12/13/13.
    - Publishers remain concerned about providing usage statistics; they need to be educated that low usage may lead to more user training rather than cancellation.
- A bibliography for Project COUNTER is being compiled.
- It's up to the Serials Committee to promote Project COUNTER to CRIV.
- The six-member Task Group is recruiting more members.

New Business

Transitioning from print to electronic. During the discussion, members made the following comments or identified the following issues:

- Duke University does not cancel print automatically if an electronic version is available, although they did cancel some loose-leafs. Some law reviews and reporters were cancelled because of a cooperative project between Duke and the University of Virginia, or because a title became available on HeinOnline.
- Arizona State University cancelled print reporters and state codes because they rely on HeinOnline. One unresolved problem is how to continue routing or "pushing" online issues. Table of contents (TOC) services have not been satisfactory.
- Duke maintains an in-house alerting service for some titles. TOC alerts and some publisher newsletters are received through email; then forwarded to appropriate faculty by setting email account options.
- Law Journal Press titles are being cancelled due to price increases resulting from the print plus online subscription model change, especially if the titles are available on the Lexis.com platform as part of the ALM/Lexis deal.

- One library is forbidden to duplicate formats; staff must choose between print and online versions.
- Space issues drive some cancellations.
- Problems arise when purchase of online is dependent on print.
- One member commented that after all regional reporters were cancelled, it was disheartening to walk through the stacks and see "outdated" stickers on all those cancelled volumes.
- There is the problem of meeting the needs of public patrons, who often prefer print, when the library is cancelling print in favor of online.
- Are patrons satisfied using online versions?
    - It may depend on the age of the user.
    - The visually impaired occasionally have trouble with online.
    - In some cases, libraries have reinstated print because the online version had a poor search engine or was difficult to use.
    - Some users just prefer print.
    - The print index may be easier to use than the online search engine.
    - Not all indexes are available online.
- Comments/issues with cancellations:
    - On occasion, if the print version is canceled in error, the publisher will reinstate the subscription at a discounted price.
    - Before cancelling, staff should review the usage and circulation statistics of the print version, and consult faculty.
    - If payment for a resource comes out of a "faculty" account, users are more motivated to cancel an underused title.
    - Cancellations are mostly due to availability via HeinOnline.
    - Libraries are cancelling some reporters.
    - Libraries are binding less.
- How do libraries repurpose staff after print cancellations?
    - Don't rehire after retirements.
    - Existing staff do more tasks, although with fewer titles.
    - Staff seem willing to learn new tasks.
    - Use technical services staff at the circulation desk, where they excel at identifying and resolving problems.
- Do libraries check regularly for electronic access?
    - One library checks HeinOnline with every issue received.
    - One library checks when the invoice is received.
    - Notes are added each time online availability is checked.
    - Non-HeinOnline titles are problemmatic.

Electronic books

- Any purchasers?
- University libraries are heavy users.
- Many duplicate titles are available in e-book packages.
- Some libraries are moving away from packages to individual selections from YBP.
- E-books in mobile format would be good
- Concern about perpetual access
    - Libraries need to be clear on the difference between perpetual access and ownership.
    - Libraries are concerned about ensuring content for "the ages."
    - Libraries are concerned about maintaining access if a company goes out of business.
- The e-book format is useful for creating an interdisciplinary collection beyond the law.
- Concerns were raised about privacy and copyright. There have been instances of titles pulled from kindles because of copyright issues.
- Should the committee prepare a program on e-books in law libraries?

Lively discussion continued right up to when the meeting ran out of time and had to adjourn.

Workshop Report

Digitizing Government Information: How to Plan and Conduct a Digitization Project in Your Library

Reported by Lisa Wernke
University of Cincinnati
Robert S. Marx Law Library

The workshop began with the program moderator and coordinator, Victoria Trotta, welcoming all the participants and describing what was in store for us that day. With the help of the experts on hand, Ms. Trotta promised that by the end of the day we would possess all the information required to begin our own digitization projects and our own toolboxes for preservation. The day was divided into two parts: the first was an overview and discussion of how to create and manage a digital collection. The second part consisted of demonstrations of successful digitization projects and opportunities for participants to ask questions.

Why should we as law librarians be concerned with digitization of government documents, or other collections that may be at risk? David Walls, preservation librarian at the Government Printing Office (GPO), was the first to speak about digitizing government documents and starting a digitization project. Mr. Walls offered several reasons for digitizing library collections. First, it is a way to connect content (or assets) to our community of users. Second, many of our print collections have grown out of control; digitizing these collections allows librarians to rein in print collections and possibly free up space in the library, without limiting access for the user. Third, it is the perfect way to preserve collections that may be vulnerable to environmental issues and/or too fragile for people to use. Finally, 97% of government information is born digital, and 59% of adults get their information from the web, so creating a digital collection is a way of protecting information for the future.

Mr. Walls continued his presentation by addressing the planning aspects of a digitization project, including the use of standards and best practices. For help with planning, he directed us to the website http://www.digitizationguidelines.gov. Standards govern the OAIS (Open Archival Information System) model for digital information management, digital file formats, and metadata schemas for digital projects. Best practices are the consensus of a community of professional practitioners— those who already have established successful digitization projects. At GPO's Digitization Projects Registry at http://registry.fdlp.gov people can post their ideas for digitization projects, find possible collaborative partners, and seek grant opportunities.

Our second presenter, Mark Phillips, assistant dean for digital libraries at the University of North Texas libraries, discussed collection development and management issues associated with a digital preservation project. He recommended that when you first consider a digitization project you should begin with the classic questions: why, what, how, who, where, and when. He suggested that you ask yourself why starting a digitization project is right for you and your library. (1) Are you interested in digitization? (2) Can your institution sustain a project? (3) Do you have a project in mind already? (4) Are there opportunities to collaborate? Having a "why" is the most important part. Perhaps there is inadequate access to print content. There may be local needs that are not being met by your print collection. Maybe you have a special collection that is historically significant and/or physically worn. There are any number of reasons for starting a digitization project.

After identifying why you want to start a project, it is time to identify what you want to digitize. What is important to your library or community? It is possible that you may want to digitize something that was born digital or has already been digitized earlier. A lot of born-digital information isn't well-described or indexed; librarians can provide additional access points to enhance searching. The next step is deciding how you will acquire the content to be digitized. What type of material is the source: paper, fiche, film, or born digital? Do you have the systems in place to set up a digital preservation program, including the equipment and staff? Are there standards and best practices for your project? Who is going to work on this digitization project? Will your library be going solo or will you be working with another institution or consortium? Are there others who are interested in this content? Finally, does it make sense to share the work or keep it all in-house?

Addressing the "where" of a digital project is next. This raises the question, "Do you have space to stage a project?" Where will the content of the digital project reside? Do you have storage space on a server, network or local PC? How much space do you need, both physically and virtually? How much do you currently have? When the project is completed, where does the digital content go? When does the project need to be completed? Are there time frames in place? Are there grant deadlines? Deadlines and dates could be used for publication purposes and for rolling out the new digital content to your user community.

Both Mr. Walls and Mr. Phillips discussed why digitizing a paper collection is ideal for the user and for the institution. Access to and use of a paper collection can be limiting to the user. Paper collections are specific, and there is no cross-content search capability. Access is also limited to one user at a time. Some special, historic, and/or rare collections are less accessible due to security concerns or because content is fragile. Digitizing these collections provides a better user experience and access to high-demand publications. It is also a way to allow our user community to use historic and rare materials in special collections without worrying about security or damaged materials.

Following the introduction and overview that Mr. Walls and Mr. Phillips provided, a panel presented five successful digitization projects. The panel included Janet Fisher of the Arizona Memory Project, Judith Meadows of the Montana State Supreme Court, R. Lee Warthen of the University of Utah Law Library, Mark Phillips of the University of North Texas libraries, and Sarah Rhodes of the Chesapeake Project, which harvests born-digital documents. The panelists discussed their specific projects and introduced us to the various types of software and content management systems that they were using. This provided a good look at what individuals and collaborative groups have chosen for their digitization projects, whether with a narrow or a broad focus.

This workshop was a good overview on how to start and manage a digitization project, whether for government documents or another collection. As Mr. Phillips pointed out, the only way to learn how to digitize is to start a digitization project. If you pick a small pilot project and carry it through, it will lead you to other projects more substantial in size. The wisdom imparted by all of the speakers in this workshop was invaluable, and I look forward to implementing some, if not all, of their ideas into a project of my own.

Workshop Report

Putting the "M" in ERM: Best Practices in Electronic Resources Management

Reported by Amy O'Connor
University of Richmond Law Library

As a new technical services/digital resources librarian, I found the workshop, "Putting the 'M' in ERM: Best Practices in Electronic Resources Management" valuable in teaching me how to more effectively manage all aspects of electronic resources.

Gordon Russell from Lincoln Memorial University began the program by discussing how to re-image your law library to incorporate electronic resources. Since law libraries are no longer just about books, microfiche, and just-in-case collections, librarians need to begin looking at the best practices for acquiring electronic resources. The first step in this process is evaluation. Russell highlighted the six characteristics of best practices in evaluation: (1) having a deliberative and designed process; (2) addressing quality and wanting to achieve high quality; (3) having a clearly defined purpose and goal; (4) understanding that evaluation is more than measurement; (5) evaluation doesn't have to be big and sometimes completing a small, focused evaluation project can lead to greater goals; (6) there is no right way to evaluate, since the need for evaluation is situational. After addressing these six characteristics of evaluation, Russell described an evaluation action plan which can be used by librarians who are in the process of building or managing electronic resource collections.

Joe Custer from Saint Louis University spoke on selection and assessment. Custer discussed the importance of having a collection development policy not only for a print collection but also for an electronic collection. Selection of electronic resources should be a collaborative process, since different professionals have different expertise and knowledge. A collection development policy for electronic resources will help the collaborative process go more smoothly. In the world of electronic resource management we have to be flexible and able to change things; a collection development policy doesn't have to be set in stone. When it comes to assessment for electronic resources, Custer noted that vendors are not required to give out statistics, so be sure to ask them for reports. Custer concluded by reminding us that statistics are only one of many ways to assess usage, and personal experiences, by demonstrating quality, might be more significant than quantitative measurements.

Tracy Thompson-Przylucki, executive director of the New England Law Library Consortium, talked about managing license agreements and vendor relations. She recommended creating a license agreement toolkit to consolidate all of the necessary tools for acquiring electronic resources in one place. The toolkit should include guidelines and examples (e.g., Yale's Liblicense Standard Licensing Agreement or AALL's *Fair Business Practices Guide*), an electronic resources checklist (with notes on evaluation, acquisition, payment, access, etc.), and an example of the standard license agreement for your library. Once the toolkit is in place, you can start to focus on other best practices, such as not to start negotiating an agreement until you have all the details. Before negotiating, contact your consortia, know your non-starters and deal-breakers, anticipate the vendor's goals, and examine your collection development policy. Another best practice is establishing a regular review process after you have all aspects of your license agreement in place. Once you have started a relationship with a vendor, remember that even if you disagree you should not take it personally; maintain respect so that future opportunities are not lost. Consider non-sales-related opportunities for relationship-building such as webinars, beta testing, advisory boards, etc. Thompson-Przylucki closed with one last great piece of advice: educate your users and seek teachable moments. The more students, faculty, and others know about your interests and what you do, the easier your job will be.

Timothy Cherubini, director for regional services at Lyrasis, discussed avoiding the square peg syndrome and managing electronic resources workflow. The square peg syndrome refers to how too often our (well-intended) solution has been to build on what we know, namely existing workflows. Many of us start out assuming that we can acquire and process electronic resources the same way as print, which can get us into trouble. We need to start examining our resources, clients, and workflows. We can begin by understanding who our clients are and what they want, and then design from that perspective. Cherubini told us how to begin "process mapping:" mapping the current workflow process, analyzing it, and working from that point. Process mapping helps build staff support and gain control of what could be a chaotic environment.

Another useful presentation was given by Cynthia Bassett, electronic services librarian at the University of Missouri, about best practices for marketing electronic resources. She suggested a wide variety of ways an electronic resources librarian can become more interactive with and familiar to users. Building relationships with faculty and students or your law firm's attorneys is a key first step. By being visible to those users, your role in marketing electronic resources will be easier and more fun. Another best practice is to use social media outlets to market your resources. By registering a Facebook or Twitter account and promoting your resources through tweets or status updates, you might be able to reach more users. Bassett also suggested gathering users together to train them on how to use an electronic resource. LibGuides are also useful tools for promoting electronic resources. If your library uses LibGuides, you can create customized, personal guides for your users as one-stop shops of the best resources in their research areas.

The day concluded with Mary Dzurinko's talk highlighting the various ERM and discovery vendors. Important features in an ERM system are interoperability, management, knowledge base, link resolvers, statistics, reports, standards, and cost. After you have a list of essentials, you can start comparing vendors to find the one that would best fit your library. When selecting a discovery system, it is best to again create a list of must-haves. Some of these essentials could include what type of content the product can handle, available search options, and if there is a comprehensive index. Consider the system's integration and compatibility with your ILS, the quality of its interface, and how customizable it is. Overall, if your library is considering investing in an ERM or a discovery system, it is important to plan ahead and then do the research so you understand your investment.

"Putting the 'M' in ERM: Best Practices in Electronic Resources Management" was a full day of constructive information. Since libraries are continuing to change and advance digitally, this workshop was useful in detailing how to keep current and ensure that your users are accessing the relevant resources. Lastly, although many of the tasks involved in managing electronic resources can be done in an office, you still need to get out into the library and away from your computer to promote electronic resources to your users.

Program Report

AALL Keynote Address by Dahlia Lithwick

Reported by Michael Maben
Indiana University, Bloomington

The keynote address at this year's Annual Meeting in Philadelphia was presented by Dahlia Lithwick and was entitled, "The Supreme Court and Free Speech." Lithwick is a senior editor at *Slate*, where she covers the Supreme Court for the magazine. Her view is that there is a split on the Supreme Court, but not in the traditional views of such a split, i.e., liberal vs. conservative or Democratic appointees vs. Republican appointees. Rather, she believes this split is between the views of the justices on free speech and technology, largely caused by the confirmation process. Lithwick believes that the justices have a contradictory relationship with the press, declaring that they do not care what the press says about them or the Court, but closely following what is said by the press, and frequently appearing in the press and in public.

Lithwick presented her thesis using a number of court cases and the arguments and dissents presented by the justices. She included the California case involving the ban on violent video game sales to juveniles (*Brown v. Entertainment Merchants Association*, decided 7 to 2), the "crush" video case (*United States v. Stevens*, decided 8 to 1), and the military funeral picketing case (*Snyder v. Phelps*, decided 8 to 1). In both the crush video and military funeral picketing cases, the lone dissenter was Samuel Alito. In the violent video game decision, the dissenters were the two most politically opposite justices on the Court—Clarence Thomas and Stephen Breyer. Lithwick discussed in depth the dissents in these cases, analyzing the logic and reasoning each justice gave for his decision.

Lithwick's opinion is that there are three beliefs about free speech and technology that are influencing four of the justices: Chief Justice Roberts (who seems to take a middle view), Thomas, Alito, and Breyer. These beliefs are: (1) The media can turn speech into thought and action—it can change everything; (2) Technology turns private speech into public speech, especially for the justices; and (3) Assaultive speech is not speech.

She theorizes that these beliefs result from the confirmation process, particularly for Thomas and Alito, because they have indicated that they view the media as being "out to get them." The Senate and the press see the confirmation process as a political game, but for the justices, who have generally never been public figures before their nominations, it is a shock.

She concluded her talk by explaining why it matters. Her view is that it matters when justices perceive themselves and the Supreme Court as being under attack and/or brutalized by the media. The decision to lock the front door of the Supreme Court building for security reasons is an example of this perception. Lithwick's contention is that the Supreme Court should do the opposite: it needs to open up and be more transparent to the public and the media.

The address, complete with the question-and-answer session at the end, is available on the AALL website at http://www.softconference.com/aall/sessionDetail.asp?SID=250744.

Program Report

Analyzing, Managing, and Communicating About Library Budgets: How Are You Doing It?

Reported by Marilyn K. Nicely
Donald E. Pray Law Library
University of Oklahoma College of Law

Moderator: Ajaye Bloomstone, Louisiana State University
Presenters: Terry Psarras, Carlton Fields, Tampa, Florida; Richard Vaughan, Indiana University, Maurer School of Law Library; Eric C. Parker, Northwestern University School of Law Library

In this program, presenters described how they handled analysis and communication in reporting budgetary information within their institutions. Their varied approaches showed many commonalities in accomplishing this process. All speakers emphasized the importance of good communication and being aware of the needs different people in their organization have for budgetary information. They agreed that analyzing current costs and projecting future costs is essential. Budget records need to be kept at an appropriate level of detail for the organization. Many details have to be tracked, such as new orders, cancellations, inflation, and cost issues for specific publications.

Terry Psarras, manager of legal information and technology training at the Carlton Fields law firm, shared his top ten list of budget management principles: (10) Don't use library-speak, but instead gear your communication to your audience; (9) Learn how to write a business case by gathering and analyzing metrics; (8) Find out projected costs from large vendors; (7) Get projected increases from large vendors. Vendors have the goods when it comes to needed information; (6) Find out what your chief financial officer needs to know over lunch; (5) Take a partner to lunch; (4) Consider needs vs. desires, the firm culture, and how to handle unexpected costs; (3) Remember that less is more, so keep explanations short; (2) More is less, so don't overwhelm others with too much information; (1) Simplify budgeting general ledger information and include actual vs. projected data.

Richard Vaughan, acquisitions and serials librarian at Indiana University, discussed the need to have a good understanding of the financial rules and relationships within your organization. You need to know how the budget works at your institution. When you present budget information you need to take your audience into account: the business manager, the dean, the director of the library, or the collection development librarians. The collection development librarians, for example, may only need to know how much money there is available to spend. Richard divides the budget into thirds. He makes assumptions based on previous years' experience, and tracks cancellations and new orders. There may be alternatives to consider that reduce or increase costs, such as password vs. IP access, number of users, and web-hosting fees. At his library, meetings with librarians increase in frequency as the end of the fiscal year approaches, when it is important to take into consideration the length of time it takes to order, receive, and pay, so that the expense occurs in the desired fiscal year. Richard said the keys to success are: knowing the details of your organization's budgetary policies, knowing your audience in order to keep everyone on the same page, and keeping it simple.

Eric Parker, acquisitions librarian at Northwestern University School of Law, uses multiple approaches to budget analysis. He compares the last fiscal year's total budget with the current fiscal year's budget, which in the example he used was a flat, no-growth budget. For the new fiscal year he uses the previous year's expenditures as a base. Then he has to factor in new major acquisitions from the previous year as well as anticipated inflation. If projected costs exceed available budget funds, then a target amount for cancellation has to be identified. Richard tracks inflation by sampling, by using budget history, by calling vendors, and by making educated guesses. Eric also does monthly accounting of the percent of the budget expended, which indicates to him whether expenditures are trending as expected, and he converts this information to a graphical representation. He also tracks weekly expenditures for major subscriptions on a spreadsheet.

Concluding questions and answers touched on the possibility of negotiating lower costs for large subscriptions, the preferences of users for print or online, and how to justify cancellations in consultation with partners and faculty.

The program gave an excellent overview as well as details on the analysis and management of law library book/online budget planning and projection. The speakers presented different ways to collect, use, and communicate financial data.

Program Report

Authority Control Vocabularies and the Semantic Web

Reported by Keiko Okuhara
University of Hawaii

Coordinator/Moderator: Suzanne R. Graham, University of Georgia, Alexander Campbell King Law Library
Speakers: Barbara B. Tillett, Library of Congress; John Mark Ockerbloom, University of Pennsylvania Libraries, Van Pelt-Dietrich Library

This program discussed the current status of the development of Semantic Web linked data and related projects undertaken by the Library of Congress (LC). The future direction of authority control was also presented. The program explored opportunities for contributing to Universal Bibliographic Control in a global cloud environment.

Barbara Tillett's presentation was entitled, "Building Blocks of the Future: Making Controlled Vocabularies Available for the Semantic Web."

At the 2008 AALL Annual Conference, Lois Mai Chan and Barbara Tillett spoke on "The Future of Subject Access in the 21st Century." In the view of Dr. Chan, "*LCSH* is a mixture of two vocabularies: (1) Source subject vocabulary (similar to index terms found in a thesaurus), and (2) Pre-coordinated phrases or subject strings." The source subject vocabulary forms the building blocks. You can read a wonderful report written by Michael Maben in *TSLL* 34, no. 1 (2008):39-40 for additional information on Dr. Chan's presentation.

The main focus of Dr. Tillett's talk at this conference was on building blocks of controlled vocabularies and linked data. Her talk also served as a progress report on LC's initiative to leverage subject access on the web in response to the recommendations of the LC Working Group of the Future of Bibliographic Control.

Dr. Tillett described three building blocks on which LC has worked. The first building block she described is DBpedia, and its relationship to linked data. Linked data make structured data on the web more useful and reusable. DBpedia is a community effort to extract structured data from Wikipedia. Three million "things" in at least 91 different languages are interconnected on DBpedia. DBpedia allows users to ask sophisticated queries against datasets derived from Wikipedia and to link datasets on the web to Wikipedia data.

The National Library of Sweden, which was already involved with the DBpedia project, invited LC to join so that the *Library of Congress Subject Headings* (*LCSH*) could be contributed to the Dbpedia project. *LCSH* is now available on DBpedia in SKOS format (Simple Knowledge Organization System).

Dr. Tillett then discussed building block 2: The Virtual International Authority File (VIAF — http://viaf.org). The original VIAF partners were LC, Deutsche Nationalbibliothek (DNB), and Bibliothèque nationale de France (BnF). OCLC hosted VIAF to virtually combine the files of all institutions into a single name authority service. Tom Hickey from OCLC used matching algorithms to link name authority records from two national bibliographic libraries, LC and DNB, and built a server to store the combined records. Currently eighteen participants are contributing to VIAF. The project gets more popular each year; last year its usage tripled. Attendees were encouraged to contribute to VIAF.

VIAF is available as linked data utilizing URIs (Uniform Resource Identifiers). Unicode facilitates numerous script characters. MARC21, MARCXML, UNIMARC, and RDF are supported for use on the Semantic Web. VIAF mines data from bibliographic records and normalizes text to create a derived, enhanced authority record. VIAF can be used as a handy cataloging reference tool to resolve conflicts, questionable dates, forms of name, etc. It can be cited as a source in subfield "a" of the 670 field when creating new national authority records.

The objectives of VIAF are:

- Facilitate exposure of authority data
- Reduce cataloging cost (especially costly manual authority control work)
- Simplify authority control (creation and maintenance) internationally
- Provide authority data in form, language, and script users want

Next steps for VIAF are:

- Better searching
- More "linked data"
- Participants beyond libraries to include museums, archives, etc.
- More name types, such as geographic jurisdictions, family names, and uniform titles.

LCSH is now freely accessible on the web in SKOS format at http://id.loc.gov. SKOS is "a model for expressing the basic structure and content of concept schemes such as thesauri, classification schemes, subject heading lists, taxonomies, folksonomies, and other similar types of controlled vocabulary"—SKOS Primer. SKOS is based on the Resource Description Framework (RDF) from the World Wide Web Consortium (W3C). The framework provides a structure for exchanging resources between software applications and publishing resources on the web and is one of the key components in the development of the Semantic Web of linked data. The goal is for keyword searching of LC controlled vocabularies on the web to be freely searchable by the global information community. The web page for each LC subject heading has a place to submit suggestions for additions or changes, or to ask questions, as well as the option to visualize *LCSH* terms using the word cloud technique. These visualizations are clickable, so relationships can be explored. For questions about the content of this site, contact Libby Dechman in LC's Policy & Standards Division. Technical questions should be addressed to Larry Dixson in LC's Network Development and MARC Standards Office. A comment form and a discussion list are at http://id.loc.gov/authorities/contact.html.

The last building block Dr. Tillett discussed was *Resource Description and Access* (*RDA*). This new cataloguing code, intended to replace *AACR2*, was developed as a web product dubbed the *RDA Toolkit*. It gives instructions for identifying everything in our bibliographic universe: library collections, associated persons, families, corporate bodies, concepts, objects, events, and places. The elements and sometimes specific values are included as controlled vocabularies, for instance the list of names of languages – English, French, Spanish, etc. (American catalogers take the list of languages from the MARC format), or the list of types of carriers, like computer discs or audio files. The controlled vocabularies and the list of elements included in *RDA* are posted on a web registry run by the Open Metadata Registry. For each element, there is a URI which can be used in descriptions instead of the text string. This is helpful for displaying the language and script a user wants to see, because the URI can be converted into a display of a text string in English or German, or whatever language. Going the next step beyond just identifying the element, we can identify the specific values or types or terms that can be used when identifying that element. *RDA* is another of the building blocks that provide the identifying characteristics of the things in our bibliographic universe and provide the relationships between those things so libraries can offer displays and pathways for users to explore the collections and the resources available to them worldwide. This way, they can find what they need in global web-based systems in whatever language or script they want.

Google and Yahoo work in a cloud computing environment with linked data and a global perspective, and now libraries are finally getting into the act. I hope to see really creative services emerge that take advantage of the building blocks libraries provide through our controlled vocabularies and bibliographic data, so users can connect to our collections. That is where we need to be going. Please go to AALL2go at http://www.softconference.com/aall/ to view Dr. Tillett's handout.

The second speaker, Dr. John Mark Ockerbloom, discussed how linked data standards can actually be used. Dr. Ockerbloom's talk started with his clarification of the definitions of linked data and open data. Linked data is published on the web with persistent URIs, in machine-readable format. Open data welcomes reuse with very few restrictions through permissive licenses and easy access and replications. Dr. Ockerbloom discussed linked open subject authority data from LC (http://id.loc.gov) and Hathi Trust online books (http://hathitrust.org) and how they can be used to manage a catalog of over a million books, create rich subject browsing interfaces, and improve the quality of the University of Pennsylvania Libraries' catalog. Penn Libraries downloaded linked authority data from LC and open bibliographic data from HathiTrust to build a rich subject browsing interface for their new faceted front end. By using linked data, obsolete subjects can be automatically identified and flagged for manual review or automatic update.

More and more bibliographic and other library-related information is now freely available and reusable online, and it enables all kinds of improvements in resource discovery. Dr. Ockerbloom described linked data standards. RDF is a standard way of describing entities and their properties with which one can build vocabularies, such as SKOS for subject thesauri. There are standards to help interpret and publish the various formats. Dr. Ockerbloom explained how he used the new technologies to improve the Online Books Page, available at http://onlinebooks.library.upenn.edu/ and gave examples of websites which use open linked data. One example is the legislation.gov.uk website, which makes good use of open linked data, since legal research involves lots of structured information. It uses VIAF for authority access, VIVO (an open source semantic web application) for research and publication activity, and http://www.legislation.gov.uk for legislative citations.

Open linked data projects are really a community effort. Sharing linked data allows libraries and others to work together to improve a collective knowledge base. The Penn Libraries' catalog has been augmented and enhanced by importing authority data from LC. Dr. Ockerbloom discussed how widespread use of linked bibliographic and authority data may change how we build and use catalogs in the future. Dr. Ockerbloom's handout is available on AALL2go as well.

This program provided eye-opening discussions on how open linked data can transform the future of cataloging and enable more efficient use and analysis of large data sets.

Program Report

Cutting Beyond the Bone: Managing in an Age of Austerity

Reported by Rebecca Bearden
University of Connecticut
School of Law Library

"Cutting Beyond the Bone: Managing in an Age of Austerity" was coordinated and moderated by Alan Keely (Wake Forest University Professional Center Library). This program was presented as a role-play dialogue between a director (James S. Heller, College of William & Mary, Wolf Law Library), a head of technical services (Jean M. Pajerek, Cornell University Law Library), and a head of public services (Jennifer E. Sekula, College of William & Mary, Wolf Law Library). The director and two department heads discussed a variety of issues facing their hypothetical academic law library, appropriately named Adversity State University's Austerity Law Library.

Some of the issues facing Austerity Law Library included:

- Budget cuts
- Cancellations
- Staffing issues
- Interest in scholarship repositories
- Social media's role in the library
- Binding
- Hidden costs of library materials
- Print vs. online
- Space issues
- IT constraints
- *RDA*
- Purchasing catalog records
- Work backlogs

The role-play hit home for the majority of the audience. These are issues that most of us in the law library community are facing. Our budgetary constraints have led to cuts in staff/staff time, cuts in library materials, and even the loss of library space.

During the Q&A portion of this program, many law librarians spoke up about the cuts that they've already had to make, as well as what may be on their list to cut next. The opinions of what should be cut seemed to be fairly consistent. Canceling print where the electronic versions are already subscribed emerged as one of the most common practices for cost-cutting. Publication gaps between the current issues in print vs. online was the biggest concern for these types of cuts.

This program's content also pointed out a difference of perspective on cuts between public services and technical services. The head of public services was concerned with issues such as services for patrons, the image of the library, etc., whereas the technical services staff was worried about new book turnaround, record maintenance, etc. These departments deal with different roles and expectations within the library. Compromise is needed on both ends to make a library run successfully, especially when there is so much to do, and fewer resources to support the library's mission.

It is very clear that when it comes to "cutting beyond the bone" there are always going to be more questions than answers. But, if we make a concerted effort to keep the lines of communication open within our libraries, as well as with other libraries in similar situations, solutions can be discovered and shared.

Program Report

Electronic Resources Management (ERM) Systems Showcase

Reported by Sarah Pearson
Florida State University Law Research Center

Coordinator: Lorna Tang, University of Chicago, D'Angelo Law Library
Moderator: Shyama Agrawal, Duke University of School of Law, J. Michael Goodson Law Library
Presenters: Julie R. Stauffer, University of Chicago, D'Angelo Law Library; Amy L. Moberly, California Western School of Law Library; Eric C. Parker, Northwestern University School of Law, Pritzker Legal Research Center

As the trend in e-publishing and computer assisted legal research (CALR) continues, technical services librarians are seeing more of their budget—and time--going toward the acquisition and maintenance of electronic resources. Law librarians are quick to cite cost effectiveness, time efficiency and patron preference as common reasons for selecting electronic resources. Nevertheless, as many tech services libraries have discovered, with the shift from paper to electronic resources, former management tools have become inadequate. In an effort to better manage and maintain their e-resources, many libraries have adopted Electronic Resource Management systems (ERMs). ERMs were developed to streamline work flows and to consolidate and centralize e-resource information for library staff. In this presentation, three academic law libraries share their experiences with adopting and implementing ERMs at their institutions.

Millennium ERM (California Western School of Law Library)

The first presentation was given by Amy Moberly, head of cataloging & Innovative systems coordinator. Ms. Moberly and her colleagues had become frustrated and overwhelmed trying to manage their e-resources with a management system designed for print. Since they already used the Millennium ILS, a product of Innovative Interfaces Inc. (III), it was an easy decision to purchase and implement III's ERM. They were impressed with its seamless integration with acquisitions and the ILS and also their ability to customize the user view in both the ERM and their OPAC.

Using screen shots, Ms. Moberly demonstrated how a search of JSTOR's Arts and Sciences 1 package appeared in various modules in the ERM. Within the resource record, a pull-down menu allowed her to select 'related orders,' where the actual order record was 'soft-linked' to the Millennium resource record. She was able to navigate within the record using five tab headings: (1) Summary, (2) License record, (3) Contacts, (4) Financial and (5) Usage statistics. Each of the tabs allowed for customization of specific elements of the resource. Within the license record tab, for instance, she had the ability to include information related to ILL guidelines, site licenses, number of concurrent users, and other details specific to that resource. Additional tabs linked to contact and financial information. Under the Financial tab, she could create quick reports customizable to specific resources and time periods.

One of Millennium's highlights is that the ERM is COUNTER and SUSHI compliant. Under the Usage statistics tab, the user has the ability to create cost per use analysis. If a vendor is COUNTER-compliant, the institution can import its statistics into the ERM, which will then perform a cost per use analysis. If a vendor is SUSHI-compliant, the Millennium ERM will go out to the vendor, grab the statistics, and pull them into the ERM to perform the cost per use analysis. At the time of acquiring Millennium's ERM, California Western was also given a one-year trial of CASE, another III product, which allowed them to easily do coverage updates.

After walking us through the various modules of the ERM, Ms. Moberly demonstrated how the resource information appeared in their OPAC. Using her same example of the JSTOR Arts and Sciences 1, she showed how the terms of the license agreement were visible to their users. This and other information was customizable to the library's needs. Finally, the ERM has the ability to warn patrons when a vendor database is down. By entering it once into the ERM, all bib records linked to that resource will display the information. According to III's website, the Millennium ERM is a stand-alone system and does not require the Millennium ILS, though with other systems there will be the loss of some integration.

Ms. Moberly concluded that the elimination of the chaos and frustration in tech services workflow more than justified the expense of ERM.

Pros: Integrated very well with ILS and acquisitions. Customizable.
Cons: None given.
Customer Support: Ms. Moberly highly recommends purchase of the three-day training offered by III. She attributes the fact that their ERM was up and running in three days to the excellent training that they received.

Serial Solutions ERM (Northwestern University School of Law)

Next, Eric Parker reported on Northwestern Law School's August 2009 purchase of three Serials Solutions products: Core, Counter and Resource Manager. Now owned by ProQuest, Serial Solutions' ERM is a web-based product hosted on the Serial Solutions server.

The Serials Solutions home page looks like any company web page, linking to webinars, customer support, other Serials Solutions products, and Data Management. Data Management is the control center for their ERM product, and contains the 'management tools' that allow for record customization and maintenance.

At implantation, the Resource Manager is populated by searching the Serials Solutions 'E-catalog' and importing the e-resources to which your institution subscribes. Searching HeinOnline, for instance, Mr. Parker demonstrated the ability to customize that resource to reflect only their subscriptions. Once the resources are loaded into the ERM, supplemental information, such as cost history, can be added to the record through the use of templates (downloadable Excel files) provided by Serials Solutions. Northwestern Law chose a template and ran queries against their Library Management System (LMS) to populate the templates with the data they wanted, then saved them as text files, uploaded them to Serials Solutions, and batch-loaded their data. They repeat this process every month or two in order to keep their cost data current.

Once the records have been loaded, they can be managed using a set of 'Management Tools' that link to various facets of the resource records, such as contacts, licenses, or vendor statistics. Using these tools, the ERM can be further customized to the institution's specific needs, adding or deleting headings as needed. The 'Alert' tool, for instance, allows the institution to set up alerts that will notify it in advance of a resource's renewal date. There are also tools for managing contacts, licenses, and vendor statistics, to name just a few.

Besides the ERM, Northwestern also subscribes to the E-Journal Portal product, part of 360 Core. The Portal allows for alternative ways to search journals, such as by title, ISSN, browse, or subject. It also includes coverage dates. This feature, like the others in Resource Manager, allows for customization and branding.

The 360 Counter product creates reports for usage statistics and analysis. For instance, Northwestern is able to run a report on the top one hundred journals by usage, as well as the one hundred most expensive journals based on cost per use. According to Mr. Parker, these make nice reports which can be exported and saved in PDF or Excel. Counter also includes an overlap analysis tool which can provide an overall macro-view of their collection in this area.

In setting up the Resource Manager, Northwestern Law chose to include only those resources paid for in full or in part by them. It was also necessary to determine who would be responsible for the various tasks involved. This involved redefining the workflow and job descriptions of some of the library staff, as well as setting priorities, since some aspects of the data management system are time-intensive.

Pros: Hosted by Serial Solutions on their server; did not require any software to install, configure or maintain. Accessible anywhere that has a computer with an Internet connection and web browser. Fairly intuitive and configurable.
Cons: Appears to update on a daily cycle rather than dynamically; can be slow to refresh and show up in the Resource Manager.
Customer Support: Sufficient— conference calls with the implementation team and some local training.

Home Grown System using MS Access (University of Chicago, D'Angelo Law Library)

When D'Angelo Law Library restructured its technical services in the summer of 2010, Ms. Stauffer went from being head of acquisitions/serials to head of acquisitions and electronic resources. In her new responsibility, she quickly realized the need for a better system for managing and maintaining their e-resources. Specifically, Ms. Stauffer recognized the need to track each step of the life cycle of an e-resource. She identified eight steps:

- Interest: initial interest, pricing, and accessing the resource
- Trial: trial period and feedback from users

- Selection: decision to purchased or not purchase and why
- Order: ordering and negotiating the license (when applicable)
- Activation: activation and invoicing of product
- Discovery: making the resource discoverable in catalog and library web page of law-specific databases, and setting up with proxy server
- Usage statistics
- Renewal (or cancellation)

To keep track of all aspect of the e-resource, Ms. Stauffer created a database using Microsoft Access which represented all the components she had identified. The database she created allowed her to input the name of each e-resource with identifying terms such as publisher, URL and contact information. She is able to navigate within each resource record by using five tabs: (1) Interest, (2) Order, (3) Discover, (4) Usage, and (5) Support.

Using the 'Interest' tab, for instance, Ms. Stauffer is able to create notes outlining the reason for interest in a resource, price quotes, whether their consortium would share in the cost, and the dates of the trial period. This tab also has a place to keep login information, and whether or not the resource was purchased. She uses information in this tab to keep her colleagues abreast of the progress of trial periods on a staff-only web page.

Rather than duplicating the order information, the 'Order' tab is used to confirm activation of a resource once purchased. The resource is searched using several access points to verify its discoverability. This tab also includes a PDF of the license or any other documentation associated with the resource, and space for notes, such as the cancellation of corresponding print resources.

The 'Discovery' tab is a record of all the steps necessary to make the resource discoverable to patrons. This includes notifying their contact to set up proxy server access, as well as adding the resource to the Database Finder, the online catalog, and the law library web page. Decisions about the availability of individual MARC records and whether or not any were purchased are also documented on this tab.

The 'Usage' tab pulls data from another database to graph statistics. This feature is still under development, as she hopes to include statistics by year in the future.

Also under development is the 'Support' tab. Here Ms. Stauffer would like to track problems and issues related to a resource, and whether or not the issue was resolved.

Pros: No expense involved. Completely customizable.
Cons: Time intensive, MS Access skills required. Currently available on one computer only. (Ms. Stauffer would like to make it a web real time/non-editable version with the ability to be accessed by co-workers). It does not integrate with ILS or OPAC.
Customer Support: None.

Program Report

The Elusive Updating Loose-leaf: Cataloging Standards and Practices for the 21st Century

Reported by Sue W. Burkhart
U.S. Court of Appeals, 11th Circuit Library

Moderator: Rhonda Lawrence, Hugh & Hazel Darling Law Library, UCLA School of Law
Presenters: George Prager, New York University Law Library; Melissa Beck, Hugh & Hazel Darling Law Library, UCLA School of Law

In her introduction, Rhonda included a brief publishing history of loose-leaf materials, which were largely invented to fulfill a need to disseminate new federal laws in a timely fashion, combined with the recognized commercial advantage of creating ongoing subscriptions, as recognized by legal publishers. There has always been a lack of standards for loose-leafs. Sizes of binders and interfiled pages weren't always uniform, publishers employed deceptive marketing practices, and they dealt with fierce competition and takeovers of one another. There was also the ever-escalating cost of legal materials, which continues today.

In their presentation, George and Melissa took turns presenting the latest information about cataloging updating loose-leafs (also known as print integrating resources). The topic is still relevant, as new titles are still being published, and older titles may need their bibliographic records updated in existing catalogs. Important resources for information include *Integrating Resources: A Cataloging Manual*, available at the website for the Program for Cooperative Cataloging (PCC). The PCC website also contains links to current MARC 21 tags and coding practices for continuing resources, and guidelines from the Library of Congress in applying new fields and headings, including the multiple 260 fields and genre/form headings.

Cataloging activities covered in the presentation included creating new records, editing existing records over time to reflect changes in the publication, and closing out/linking records for earlier editions/titles. Other topics covered included how to determine when a new record needs to be created, evaluating the cataloging copy you may encounter in shared databases, classification/cuttering practices for print integrating resources, and how to apply subject and genre/form headings. The presenters also shared a brief history of how the cataloging and MARC 21 coding has changed since the major 2002 revision of *AACR2*, and how it may change in the future when *RDA* is implemented. Cataloging examples engendered questions and discussion after the presentation.

The main theme throughout the program was: Don't be afraid to update or re-catalog updating loose-leafs. Older titles need updating with linked fields to new titles. This was a very informative program for anyone who deals with cataloging legal material, and loose-leafs in particular.

Program Report

Emerging Technologies and the Library Manager: How to Navigate the Decision Maze

Reported by Georgia Briscoe
William A. Wise Law Library,
University of Colorado School of Law

In this engaging hour, Richard Jost (information systems coordinator at University of Washington Gallagher Law Library) and Simon Cannick (associate dean for information services at William Mitchell College of Law) discussed recent technology projects at their libraries and what they learned from them.

Richard explained how he wanted to use BePress Digital Commons to create an archive of all publications at the University of Washington School of Law. However, his library administration thought the software price was too high, especially considering that the main campus library was using the open source product *D-Space* at much less cost. It turned out that the least expensive product was also much less user-friendly and more labor-intensive. It took over two years for his department to archive two law journals. Richard finally decided this was not good value, so he canceled the project and wrote a grant proposal for a new one instead.

After three years, Richard felt he doesn't have much to show for his efforts, but he learned a great deal about managing a technology project. Here are some of the lessons he learned:

- Start with a mission statement, proposed budget and procedures, and projected timeline.
- Get the head administrator on board early; you always need institutional support.
- Learn who will make the final decisions.
- Get as much buy in or support from staff as possible.
- Get good turnout at product demonstrations.
- Don't assume because it is free that it is the best choice.
- Don't be afraid to move on.

Simon told of being asked by his dean, after one month on the job, to "envision the future of technology in legal education." He was asked to show "bold vision—50 years out!" With ten faculty members on the committee, this turned out to be next to impossible. Instead, Simon created a very successful institutional depository using BePress. He took a difficult situation and turned it into a success story. Simon shared these insights:

- Get clarity from participants early; if the idea ages well, it will become their idea.
- Know how the library fits within the law school, especially regarding the budget.
- Avoid big committees; three to five members is best.
- If possible, write the charge and select the committee members yourself.
- Do lots of legwork in advance.
- Be open to all ideas; don't be defensive; be objective.
- Don't become emotionally attached to one product or idea; be calm; don't become hyperbolic.
- Always be constructive and helpful.
- Look for unengaged talent in your library that you can use.

- Don't be afraid to say "no"; librarians always want to say yes.
- Research other libraries that are working on such a project; learn from their mistakes.

In summary: Technology is the easy part of embracing emerging technologies. Management issues such as communications, staffing, and drafting policies are the hard part! There are many ways to effect change; finding the right one seems to be more than half the battle.

Program Report

Enhancing Library Services with Technical Services Skills: From the Backroom to the Front Lines

Reported by Kerry Skinner
Arizona State University

Presenters: Sara S. Repinski, Widener University School of Law; JoAnn Hounshell, Chicago-Kent College of Law Library, Illinois Institute of Technology; Sallie Smith, University of Pittsburgh, Barco Law Library; Patricia Roncevich, University of Pittsburgh, Barco Law Library

Like most law libraries, Widener experienced a decline in budget and a simultaneous decrease in traditionally defined technical services work. Sara Repinski, the technical services team leader, shared how Widener addressed the changing needs of the library by evaluating staff skills to creatively assign staff where they were needed in other areas of the library and law school.

At the heart of Sara's solution was uncovering and exploiting the existing special skills and talents of each individual staff member. She advocated cross-training in other departments, keeping in mind that those departments could be experiencing decreasing workloads too. Identification of staff talent allowed the library to provide new services and to expand staff duties into work outside the traditional bounds of the library, sometimes directly assisting other law school departments.

Sara reminded the audience to be sure to show the staff appreciation and recognition for their contributions—both when small goals are accomplished and when long projects are completed.

The economic downturn also negatively impacted the Chicago-Kent College of Law Library bibliographic services staff. Morale declined as people feared for their jobs. Associate Director JoAnn Hounshell recognized that to survive the change, bibliographic services needed to embrace the "Three Rs"— to be Resourceful, Resilient and Ready. The library's administration evaluated workflow to identify the most vulnerable positions, and looked more closely at staff skills, interests, hobbies and coursework to see if they could be used to develop new services and programs for the library. Additionally, they reviewed the Hanover Research Group's 2011 *Law School Library Benchmarking Study* to try to determine where law libraries will be in five years. It became clear that the services most likely to be cut were those traditionally thought of as technical services, while other areas of library services were expected to grow (e.g., digital, scholarly and institutional repositories, and faculty services).

In response, the library structure was reorganized, new job descriptions were written, and staff has been cross-trained in other departments. Reinvestment in individuals and additional training led to an improvement in morale. The staff experienced recommitment to the library, which in turn allowed the library to develop more programs and partner with the law school in new ways.

In order to manage the challenging economy and deal with expanding technology amidst staff reductions at Barco Law Library at the University of Pittsburgh, Sallie Smith and Patricia Roncevich, the co-chairs of their technical services department, realized that they needed to build a well-rounded staff that combined technical skills with a focus on customer service. Sallie Smith, cataloging and systems librarian, discussed what they did to "rally the troops and cross troubled waters," which included assigning technical services employees to work shifts at the circulation desk. Sallie discussed an analysis that revealed how the public and technical services departments require similar skill sets that manifest and are evaluated differently in each department. As the areas of the library blend, they ever more clearly share a common mission, "to provide access to the collection and to provide services."

Sallie covered how to introduce and initiate a change, some of the challenges that can be expected as the change is occurring, and the final rewards for both staff and supervisors as a result of the change. She pointed out that change is more easily accomplished in a place conducive to formal and informal interactions. She advocated holding regular gatherings and informal activities to promote familiarity and group cohesion, giving rise to opportunities for spontaneous conversation.

Patricia Roncevich, acquisition/serials/government documents librarian at Barco Law Library, discussed the evolution of their regularly scheduled informal gathering, "Snack and Chat," which continues to help their library function as a cohesive unit. She also noted that one of her library's challenges is that workload is increasing for all the librarians, even though technical services work specifically is diminishing. By taking advantage of existing staff talents, retraining, and shifting staff to other tasks, cross-departmental library teams have been able to accomplish a wide range of projects and provide new services. Examples of these services include: new library maps which direct patrons to specific resources; creation of a database which allows the ERM librarian to create an annual ranking report for the dean; collaboration among librarians, staff and faculty to create library displays which use the artistic talents of technical services staff members; an enhanced faculty liaison program in which all the librarians have faculty assigned to them; well-attended lunch presentations and outreach activities provided to the faculty called "Technical Services 101;" creation of an internal database for their digital collection of court records and briefs, allowing them to eliminate an annual subscription fee; and a new "engagement and collaboration" database which allows the faculty liaisons to track faculty contributions to the community outside the law school.

While each presenter acknowledged the growing pains associated with major staffing changes in their libraries, they all seemed to conclude that the end result is well worth the discomfort and effort required. This program was well-attended especially for the last session of the last day of the conference. The content was definitely worth staying around to hear. It's well worth checking out on AALL2go if you missed it.

Program Report

Isness vs. Aboutness: Development and Implementation of LC Law Genre/Form Terms

Reported by Sally Wambold
University of Richmond Law Library

Yael Mandelstam of Fordham University Law Library and Robert Rendall of Columbia University Library presented this fine, fascinating program. Because they have shepherded the work in AALL from its beginning, Yael and Robert were the perfect presenters.

The program related the history of the Genre/Form Project. The law project had three phases. The first was the evaluation of William Benemann's *Genre/form Terms for Law Materials* (*GTLM*). The second phase was the expansion of *GTLM* by examining free-floating subdivisions, glossaries of legal terms, Indian and tribal law, K form tables, and legal dictionaries. Third, an eight-member editorial group undertook the charge to eliminate redundancies, untangle relationships, determine scope, and add examples. The group sorted the terms into broad categories that included legislative, judicial or quasi-judicial, intergovernmental or international, legal instruments, legal finding aids, general works, reference, and miscellaneous categories. "Legislative histories" was the genre/form term example used to illustrate a scope note, a legislative histories title, and the provision of broader terms (BT), narrower terms (NT), and related terms (RT).

The program described policy questions which required answers from the Library of Congress Policy and Standards Division (PSD). Issues included harmonizing existing *Library of Congress Subject Headings* (*LCSH*) with the new genre/form terms, and removing the "form" aspect in *LCSH* scope notes that were used as both form and topical headings (e.g., **Constitutional amendments**). Form-only subject headings such as **Constitutions** and **Law reviews** will eventually be canceled, but not before genre/form terms can be associated with jurisdiction. PSD also decided that there will not be cross references between *LCSH* and the *Library of Congress Genre/Form Terms for Library and Archival Materials* (*LCGFT*) since the two are separate thesauri, and that the form subdivision $v will only exist in *LCSH*. Form subdivision $v will continue in use until further notice. Archival materials are logical terms in *LCGFT*, e.g., **Wills**, **Contracts**. In contrast, formats are not in *LCGFT*, e.g., CD-ROMs.

Basic principles emerging during the project:

- *LCGFT* is a true thesaurus.
- Terms should be specific but not too narrow.
- Terms should reflect current usage.
- Terms should work across legal systems.

These principles were explained in more detail. The distinction between *LCGFT* and *LCSH* lies in their inherent structure. While *LCSH* was built from the bottom up, with cross references added at a later date, *LCGFT* was built from the top down. It was developed from the start with cross references and has a true hierarchical structure, with broad "bucket" terms at the top. All law genre/form terms are listed under the "bucket" term **Law materials**, though as a term it should only be used for collection-level records that include multiple genre/forms.

The importance of balancing the need for specificity with the need to group like materials together expressed the essence of the principle, "Terms should be specific but not too narrow." **Legislative materials** is a broad genre/form term and applies to congressional/legislative hearings, digests, documents, journals, proceedings, proposals, reports, resolutions, and more. The editorial group elected to use the term **Dictionaries** rather than the more narrow term "Legal dictionaries." Nevertheless, the editorial team chose **Commentaries (Civil law systems)**; though this term may yet change to **Commentaries (Law)**. **Hornbooks (Law)** is part of *LCGFT*; "Nutshells (Law)" is not. Rare terms have a place in *LCGFT*: **Indulgences**, **Custumals**, and **Remonstrances**. "Codicils," however, was added as a UF (Used for) reference under **Wills**.

To comply with the third principle, reflecting current usage, the editorial team consulted various sources, including reference librarians, *LCSH*, legal literature, *Black's Law Dictionary*, Google, and Wikipedia. To ensure that the terms would work across legal systems, the editorial group tried to avoid, whenever possible, US-centric terms.

Following the explanation of principles, the program focused on examples of challenges facing the editorial team. Harmonizing civil law system codes and common law system codes was one illustration. After considering different proposals, the group decided upon **Statutes and codes**. "Treatises" was a second case in point. Should the term be "Treatises," or "Legal treatises," or omitted altogether?

After the draft was completed, the group released it for comment in July 2009. The group then revised the document, and the AALL Cataloging and Classification Committee approved it in October 2009. After that, the Law Editorial Group and PSD fine-tuned terms to ensure good fit with *LCGFT*. In October 2010, LC officially announced the incorporation of the law genre/form terms into *LCGFT*.

Now, the challenge is to apply the terms both to current receipts and retrospectively.

Program Report

Library in the Clouds: Cloud Computing and Its Impact on Library Services

Reported by Christine Korytnyk Dulaney
American University, Pence Law Library

Presenters: Erik Mitchell, Wake Forest University, Z. Smith Reynolds Library; Andrew Pace, OCLC Online Computer Library Center; Roy Balleste, St. Thomas University Law Library

As libraries explore and develop their next-generation library catalogs, cloud computing has emerged as a critical component of these new systems. This program provided technical services librarians and library administrators with a basic understanding of cloud computing and an outline of the advantages and disadvantages of this model.

The first speaker, Erik Mitchell, defined cloud computing as a "pay for what you use" model, which is easy to replicate, service-focused and scalable. The benefits of cloud computing include saving time, reducing personnel and eliminating local hardware. Cloud computing offers benefits of efficiency, lower cost and ease. By demonstrating the "business cloud," Mitchell showed how cloud computing has been adopted by many commercial applications.

Although the opening video made cloud computing seem very easy, Mitchell believes that for the library application cloud computing is actually more complex, because of the uniqueness of libraries. Cloud computing adds both opportunities and challenges for a library. Increased collaboration with external partners is critical, since working in the cloud impacts every aspect of a library, including its organization, finances and strategic direction. Despite the challenges, the computing infrastructure at Wake Forest University is 90 percent in the cloud.

The second speaker, Andrew Pace, described how OCLC has developed Web-Scale Management Services (WMS), a product which leverages the scalability of cloud computing to improve the efficiency and visibility of libraries' collection and management services. Although both cloud computing and web-scale services require the successful intersection of infrastructure and data, WMS adds services and community. This additional capacity allows libraries to leverage global cooperation on a local level, not only for creating and sharing catalog records, but for sharing other library management services as well.

The implementation of cloud computing to develop its next-generation catalog was demonstrated by Roy Balleste of St. Thomas University Law Library. St. Thomas chose WMS because of its ease of use, efficient workflows, customer support from OCLC, and quick training. Patron privacy, however, remains a concern. With cloud computing, information about users can be vulnerable. Balleste suggested that librarians may be in the best position as a group to develop privacy standards and guidelines for library systems that rely on the cloud.

This presentation outlined the landscape of cloud computing and how it is evolving for use in libraries. An understanding of cloud computing and its features is instrumental in the development of next-generation library systems. Although the opportunities which cloud computing offers libraries can lead to enhanced user services and collection visibility, there are security challenges to overcome. It is critical for librarians to understand cloud computing, and then work together to leverage the improvements this new architecture offers and address the potential difficulties it presents.

Program Report

Library Operations and the Evolution of the ILS: Backfield in Motion?

Reported by Erin Harper
Edwards Angell Palmer & Dodge LLP

"Library Operations and the Evolution of the ILS: Backfield in Motion?" was an exploration of the edge of the world of library systems. The question mark in the title reflects the exploratory nature of the program, which provided both an overview of the latest developments in the integrated library system (ILS) as well as a specific example of an ILS on the edge of development. It was coordinated by Ellen McGrath of the University at Buffalo, SUNY and moderated by Hsi-Yen Chen of the Duke University School of Law.

Even though both speakers represented ILS creators, they came from very different points of view. Mike Tartaglione, managing director of the Eastern District for Ex Libris Group USA, spoke about the next generation of library services being developed by his company. According to Mr. Tartaglione, library discovery was first developed with the end user in mind as opposed to library operations. While OPACs and discovery layers continue to refine the library patron's experience, librarians in technical services must find ways to funnel diverse work products into a system that looks increasingly old-fashioned. However, new developments in the field are taking the needs of the back end of libraries into account.

An approach called Unified Resource Management increases workflow efficiency by consolidating multiple frameworks in order to extend the range of services available. Mr. Tartaglione explained that the "silos of information" represented by print, electronic, and digital items have been streamlined for the end user with the new discovery layers on the market today. Unfortunately, those vertical silos will continue to create duplicate work for librarians until horizontal workflows are instituted for the back end. The unified format and tightened workflows should be coupled with a cloud-hosted, open platform. Ex Libris Alma provides both of these aspects. With a cloud-based system, libraries don't have to worry about hardware. An open source platform allows larger libraries to share their wealth with smaller ones; a large IT staff at one institution can build and share widgets and plug-ins with those more thinly staffed. The basic product allows for streamlined and consistent workflows, while the cloud-hosted system encourages community collaboration. You can find more information on Alma at http://www.exlibrisgroup.com/category/AlmaOverview.

The second presenter was Michael Winkler, director of information technology and digital development at the University of Pennsylvania. Mr. Winkler is one of the staff members at the University of Pennsylvania spearheading the Kuali OLE project. Kuali OLE is an open source software project developing an ILS based in a community of top research libraries. While the Kuali Foundation provides licensing, legal counsel, and a technology base, the academic libraries that make up the partnership (Indiana University, a consortium of Florida schools, Lehigh University, the Triangle Research Libraries Network in North Carolina, University of Chicago, University of Maryland, University of Michigan, and University of Pennsylvania) collaborate on the design and functionality of the software. The private sector provides cloud computing capabilities and other infrastructure support; the academic library community provides librarians who know which innovations in ILS design will be most valuable to them. Academic libraries have a history of collaboration, and the Kuali OLE project seeks to leverage that history by using their combined experience and resources to create a next generation technology product. You can find more information on Kuali OLE at http://www.kuali.org/ole.

Kuali OLE is only one example of the general ideas outlined by Mr. Tartaglione, but it serves to highlight the community-based thinking inherent to cloud computing and open source technologies. Mr. Winkler emphasized that in the Kuali OLE product, librarians are "driving the bus." They design the product based on their own needs, and the support of the Kuali Foundation frees up staff time to allow innovation.

In an era when librarians are constantly asked to do more with less, there are valuable lessons to be learned from each presenter at this program. First, the back end of the ILS must be streamlined to increase efficiency and decrease redundant workflows. Second, libraries benefit from sharing resources. The future of the ILS appears to be moving from back to front.

Program Report

The Public-Technical-Systems Connection: For a Great Library Experience It Really Matters (OBS Hot Topic)

Reported by Beverly Burmeister
Valparaiso University Law Library

Contrary to my expectations, Steven Bell did not focus on the relationship between public services and technical services; instead, he focused on the relationship between the library staff and the customer, the underlying message being that the staff should be working together toward the library's goals rather than working at cross-purposes. Bell defined his "great library experience" as a "total experience" involving everyone in the organization. According to Bell, the "user experience" he described was deeper than the common term "customer service." He illustrated the difference between "user experience" and "customer service" with the following vignette: Before 1888, photography required fourteen steps. It was complicated, and not everyone could do it. However, Eastman changed all that with the creation of the "one step" Brownie camera. His slogan was, "You push the button and we'll do the rest." The slogan wasn't about technology, but the "total experience." Adjectives for the experience with the new Brownie camera might include: unexpected, creative, easy, stands out from the crowd, and unique.

How could libraries do something like this? Studies have shown that users actually may expect a bad experience in the library, so changing expectations is key. Bell suggested that libraries could design an environment that facilitates a "wow" experience by focusing on three outcomes: (1) be different; (2) be memorable; and (3) create loyalty. Key concepts included personalizing the experience, creating meaning by establishing emotional connections, and building relationships. These concepts have a different quality from other customer service approaches with which I was familiar.

Bell gave an interesting example of a Starbucks employee who always drew the most customers because, even though her time with each customer was very brief, she was able to create a personal connection with each one. How could library staff make this emotional connection? Bell advocated enlisting staff in developing an "experiential brand statement" or EBS. This is not a mission or vision statement, although these could be reviewed when building the EBS. Rather, the EBS succinctly states the experience you want the community to have when using the library. Examples of experiential brand statements are, "Create it here with us," or, "Anything is possible here." EBS could be the touchstone that grounds staff in making the right decisions in their relationships with customers. As explained above, words and phrases related to emotional connection are very important.

Although the presentation didn't directly address public services and technical services working together, the focus on the "total" approach, with library staff at every level involved, might itself result in a more unified staff. This program was not specifically for technical services librarians, but for any librarians who want their libraries to be more welcoming places. As one who has had a lot of exposure to customer service approaches in different organizations with which I have been associated, I think the EBS approach, with its emphasis on emotional connection, may have a better chance of succeeding.

Bell held my attention, and was a good communicator. My one criticism is that his handout was not available online or in print at the time of the presentation. Attendees who prefer to make notes on the handout were out of luck. I don't consider requiring participants to email the speaker after the presentation to ask for the handout good customer service.

Program Report

The *RDA* Decision and What It Will Mean for Me and My Library

Reported by Ashley Moye
Charlotte School of Law Library

Throughout my library career, acronyms have simultaneously struck curiosity and fear in the nether regions of my mind. It began as far back as library school, with my cataloging professor doing her best to explain the nebulous concepts of *Functional Requirements for Bibliographic Records* (*FRBR*). I remember staring blankly at the convoluted slides on her display, asking question after question, and rarely receiving a satisfactory answer. It seemed that even the cataloging experts had a difficult time putting such things into words, and the professor radiated joy that as an older cataloger soon to retire, she wouldn't have to be bothered with such things. And with that I filed *FRBR* away in a dark place, avoided at all costs, forgotten and abandoned, hoping against hope that I too would never have to revisit the concepts.

Enter librarianship and the associated trials and tribulations of metadata and authority control. With the dawning of a new cataloging age, suddenly *FRBR* was out of its dark place, this time joined by his friends *Functional Requirements for Authority Data* (*FRAD*) and *Resource Description and Access (RDA*). The concepts together proved no less unwieldy, despite having actual library experience under my belt. As resident metadata maven at my school, I was no longer able to hide in my denial closet with my fingers in my ears. And so it began.

Since the introduction of *RDA*, I have participated in countless webinars, tutorials, and programs on the subject, in person and virtually, synchronously and asynchronously. Almost every single one of these experiences left me in a tailspin, driven less by my actual confusion and more by the lack of substantial content presented. This wasn't through any fault of the presenters, but instead due more to the slow process of acceptance rippling through the American cataloging profession. Without an authoritative national decision to accept *RDA*, programs oftentimes presented more questions than answers, and apart from the ah-ha moment of finally understanding *FRBR*, thanks to Barbara Tillett, there were few high points to speak of…

Until now. Despite its lack of PowerPoint bells and whistles, the excitement throughout "The *RDA* Decision and What It Will Mean for Me and My Library!" was palpable. A decision had been made – implementation is imminent. What do we do now? And with this program, after what seemed like an eternity of waiting, I finally received some long-awaited answers.

The first portion of the program was presentation-based, with speakers Jean Pajerek and Pat Sayre-McCoy outlining the major changes of *RDA*, providing beaucoup references to supplementary materials and, more importantly, sharing their first hand experiences both in training their own staff in preparation for *RDA* and in implementing records within their own libraries. Never have I heard such an honest, candid discussion – perhaps because the speakers weren't restricted by traditional presenting methods.

Participants learned more of the mystery of those new 33x fields and ways real libraries were dealing with this content – some choose to display the fields, some choose to suppress. Does your patron really know what the term "unmediated" means? Will these fields cause more confusion than clarity? The juxtaposition between *AACR2* and *RDA* records both in bibliographic and authority realms was introduced, with authority records being the greatest beast of all, returning again and again throughout the program.

Workflow changes were discussed, especially in terms of libraries employing both original and copy catalogers. *RDA* is so focused on catalogers' judgment; two individuals can take the same material and catalog it in completely different ways. How do you translate that for copy catalogers? What about new original catalogers who lack the experience to trust their judgment? Cataloging documentation within each library's microcosm must be revised and revamped accordingly to support these less experienced members of staff.

Suddenly the records in your catalog express a massive range of both complexity and length, made up of both *RDA* and *AACR2* records. Even libraries that choose not to adopt *RDA* will still have these records in their catalogs–and the inefficiency of converting them to *AACR2* will keep them there. Training tips were covered, stressing the necessity of each staff member having a theoretical foundation in *FRBR* before even introducing the structure of *RDA* and the changes wrought in adopting these new standards.

Overall, it was so incredibly refreshing to see two catalogers, filled to the brim with experience and ripe to protest these changes, actually exude pure unadulterated excitement at being part of the *RDA* movement, embracing the challenges of interpreting and incorporating these new rules with relish. *RDA* introduces freedom for local policies, simultaneously supplying an international standard and offering you the ability to create catalog records with your library's specific users in mind.

The second portion of the program was question-and-answer based, with audience participation driving the content. With an audience primarily composed of technical service librarians, questions got down into the nitty-gritty of the process, often inspiring discussion not only between the presenters and the questioner, but among the entire group as a whole, and covering a whole host of topics–some ending in answers and some not.

RDA was recognized as more granular than MARC, built for machine manipulation of data, not for humans. The current MARC format doesn't exploit the capabilities of *RDA*, and technical services librarians may expect a preliminary report in approximately eighteen months concerning the transition of coding from MARC to another format. Concerns about the additional time, effort and training involved in all *RDA*-related matters were addressed repeatedly, with presenters stressing that processes will be slower, but that the user experience is enhanced in ways we could never achieve with our current cataloging practices and standards. This fact is what needs to be stressed to administration.

Templates and macros were encouraged, a quick fix that solves any number of workflow issues concerning punctuation changes and new controlled vocabularies, at least until ILS vendors begin revamping their interfaces with drop-down menus and checkboxes. In the longer term, vendor relations will be increasingly important, with flexibility and autonomy in machine displays at the forefront of our desires. Each library should be able to make local decisions about field display, following the unwritten rule of never deleting any fields, but instead suppressing them from public display. The information we are collecting in these records may not necessarily be used by patrons at this point in time, but *RDA* is an ever-changing beast, moving swiftly in a direction we can only begin to predict. *RDA* is forward-thinking and preparing the library field to be able to assist patrons in successfully identifying and acquiring appropriate materials in the world's ever expanding mass of information, regardless of how its composition changes in the future.

Authority control is a key issue, especially to the technical services librarians comprising the majority of the audience. Many questions remain in terms of reconciling *RDA* and *AACR2* authority records within your system, displaying these records to your patrons and weighing the need for privacy in authority controls. With resources such as the WorldCat Identities project and the Virtual International Authority File growing every day, how do we incorporate this burgeoning source of information into records, creating more robust content for our patrons?

Presenters recommended conducting patron surveys to assist librarians in making the whole host of local decisions related to access points and cataloging policies. Authorized access points aren't necessarily needed for everything under the sun, because keyword searching will pull the terms from the bibliographic record regardless. How do your patrons search? What needs do they bring to the table? How can your library exploit the features of *RDA* to better meet these needs?

Overall, the general air of acceptance of *RDA* overwhelmed me. Where earlier programs became a breeding ground for complaints about these new cataloging standards, this program left its participants with a clearer understanding of the day-to-day changes implementation has in store for libraries and ready to overcome the implementation learning curve and embrace these new challenges on the horizon. We stand ready and waiting, open to the dawn of a new age where patrons' needs are met both effectively and efficiently in the madhouse that is the information age.

[*Editor's note: This program report originally appeared on the* AALL Spectrum *blog as "AALL Reflections – The RDA Decision and What It Will Mean for Me and My Library."* http://aallspectrum.wordpress.com/2011/08/09/]

Program Report

RDA for Everyone: Resource, Description and Access Explained to Non-Catalogers

Reported by Erin Harper
Edwards Angell Palmer & Dodge LLP

"*RDA* for Everyone: *Resource Description and Access* Explained to Non-Catalogers" was an overview of a proposed system that has the library world in a tizzy. *RDA* is not just a new set of rules for describing library materials, which alone would be hard enough for catalogers to understand. It is also a new philosophy on how those materials relate to each other and to library users. To understand it, one must not only review the new rules, but grasp why those rules needed to be changed in the first place.

The three presenters included two catalogers and one reference librarian who also works with technology. Richard Amelung of the Saint Louis University Omer Poos Law Library provided an overview of where cataloging stands today, what *RDA* proposes to do, and a rough timeline. Amalia Contursi of the Columbia University Arthur W. Diamond Law Library used *RDA*'s proposed 33x fields as an example of how *RDA* will benefit library patrons. Caroline Young of the Rutgers University Law School Library described the possibilities inherent in *RDA*'s design. Together, the three of them gave a nuanced picture of the what, why, and how of *RDA*.

At the most basic level, *RDA*, or *Resource Description and Access*, is a replacement for *AACR2*. *AACR2* was developed thirty years ago, and is no longer sufficient to describe the new formats that are becoming more and more typical in today's library. *AACR2* is also unfriendly with others; publishers, distributors, and libraries from non-Anglo/American countries find it difficult to communicate with *AACR2*-based systems. Therefore, new rules must be written. Unfortunately, the RDA rules do not fit well in the MARC format. In the future, a new carrier will have to be devised to replace MARC. *AACR2* and MARC no longer fit the bill, because *RDA* focuses on relationships rather than transcription. While transcription is still important, it is the relationship between versions of a work, types of creators, and indeed across the bibliographic spectrum that will dictate how resources are discovered in the future.

One example of the changes to come is the GMD versus 33x field. For those who don't speak in cataloging acronyms, GMD stands for General Material Designation. It is a brief list of possible materials (electronic, sound recording, video recording, etc.) that a cataloger can assign to any given item. If included in a record, the GMD appears after the first part of the title in square brackets. *RDA* proposes to use fields 336, 337, and 338 not as a substitute for the GMD, but as an expansion of it. The 33x fields will have a controlled vocabulary that is much richer and longer than the GMD list. Not only will catalogers be able to describe an item more specifically, they will be able to do so with far more granularity by providing three points of access rather than one.

The granularity of the 33x fields points to the real purpose of *RDA*: an improved user experience. *RDA* will provide users with more ways to search, sort, and display records because there will be more access points. Of course, more access points to the catalog means more work for catalogers. For those who are willing and able to put in the work, though, the possibilities of *RDA* are nearly endless. Catalogers could work with public services librarians to determine the kinds of information needed in order to retrieve successful results from the ways patrons are most likely to search. Unlike *AACR2*, *RDA* will be flexible and able to adapt to future changes. By making *RDA* modifiable, catalogers will avoid a situation like the one we are in now. The idea is to create a system that will not become obsolete as technology continues to develop.

What do you want your catalog to do? If developers have their way, *RDA* will be able to rise to any library's demands. For now, that capability is in the future. For one thing, integrated library systems will need to be powerful and flexible enough to display the granular level of information *RDA* will provide. In the meantime, it is important for non-catalogers to be aware of the upcoming changes. Whether you build MARC records or view them in the OPAC, *RDA* is for everyone.

Program Report

RDA Test: Law Catalogers' Perspectives

Reported by Cindy May
University of Wisconsin Law Library

Moderator: Edward Hart, University of Florida, Levin Chiles Legal Information Center
Speakers: Pat Sayre-McCoy, University of Chicago, D'Angelo Law Library; Amalia Contursi, Columbia University, The Arthur W. Diamond Law Library

Pat Sayre-McCoy shared her *RDA* test experience at the University of Chicago, which was chosen as an *RDA* test site in spring 2010.

For participating University of Chicago law librarians, the first step in preparing for the test was to review *AACR2* rules for legal materials. When the *RDA Toolkit* became available in June 2010, they began exploring *RDA*'s rules for legal materials. *Toolkit* navigation improved when hot links were added. Testers were provided with free access to the *Toolkit* through the end of the official test period, which ran from October through December 2010.

More generally, all University of Chicago participants prepared for the test by:

1. Viewing Library of Congress (LC) training webcasts at http://www.loc.gov/bibliographic-future/rda/trainthetrainer.html
2. Studying the *RDA* documentation at http://www.loc.gov/catdir/cpso/RDAtest/rdatest.html
3. Meeting for weekly discussions
4. Conducting a local University of Chicago pre-test before the official test period began

Testers created both bibliographic and authority OCLC "institution" records during the test, and they were required to record the length of time they spent creating each record.

The same set of 25 titles, referred to as the "common original set," was sent to each test site. The University of Chicago site divided the common original set into five subsets of five titles each; the law library was assigned one of these subsets. Each title's "surrogate" consisted of digitally reproduced parts of the source that could be used for cataloging. Participants cataloged each title according to both *AACR2* and *RDA*, although the same participant never cataloged the same title using both sets of rules. The test also included an "extra set" of 25 titles that the test site could choose itself.

Pat's first test title was a children's Winnie the Pooh book, and her second was about Barbie. Fortunately, an e-book, a website, and even a loose-leaf publication were also included in the common original set.

Navigation was difficult at first. The *RDA* table of contents is based on FRBR entity, and some rules apply only to certain of those entities. There was keyword access, but no index. Results sets seemed to display in random order. Pat confessed that in the beginning she had little confidence that she'd found the right rule, or all the applicable rules.

Pat's tips for beginners:

1. Learn to keep the various FRBR entities straight in your head.
2. Use the *Toolkit*'s helpful MARC mapping feature.
3. Remember that *RDA* is still incomplete, and is missing chapters dealing with subject access.
4. Become familiar with the new terminology.
5. Take advantage of workflows created by other institutions.
6. Don't buy the print version of *RDA*, which will be unwieldy and will quickly become out-of-date.

Some of the problems Pat encountered during the test:

1. The rules instruct the cataloger to "record" information, but it is sometimes unclear whether the information is to be recorded in a bibliographic or in an authority record.
2. Some basic relator terms are missing.
3. Navigation is awkward.
4. During the test period there was no index. [An index has been added.]
5. She had never used OCLC institution records before, and was shocked to see that they weren't "saved," but were added directly to the OCLC database. Fortunately, she was able to go back and edit them further.
6. It was difficult to accurately keep track of how much time it took to create each record.

Authority records seem more flexible under *RDA*. The University of Chicago chose to include all information available in the piece-in-hand.

Pat plans to continue using *RDA* in conjunction with *AACR2* authority records when available, and to wait for BIBCO and CONSER standards to be issued.

Lia Contursi was the only law cataloger participating in the test at Columbia. She prepared for the test by becoming familiar with *RDA* terminology and with the *Toolkit*. Her institution conducted weekly training sessions June-September 2010. She read the LC documentation, attended ALA Association for Library Collections and Technical Services (ALCTS) webinars on *RDA*, and highly recommends Chris Oliver's book, *Introducing RDA*, available at the ALA store at http://www.alastore.ala.org/detail.aspx?ID=2897.

The Columbia test group created and discussed practice bibliographic and authority records before the official test began. They received the common original set in October, and each tester was randomly assigned some of the 25 surrogates to catalog according to *AACR2* and some to catalog according to *RDA*. A loose-leaf example was included in the set.

Lia described her experience learning how to use the *Toolkit*, which requires drilling down through a number of levels in order to find applicable sections. Searching can be very confusing, and she sometimes resorted to the *Toolkit*'s mapping feature, or to the advanced search by *AACR2* rule number.

Lia shared screen prints of a variety of examples. Some highlights:

One of her examples displayed records for the same title cataloged using both *AACR2* and *RDA*. She had color-coded the text of the rules from *AACR2* and the instructions in *RDA* to demonstrate that the descriptive cataloging of loose-leafs remains substantially unchanged. For other types of material, for example treaties, the rules have changed significantly.

Another example showed an *RDA* authority record with some of the extra information that can now be included.

New MARC authority fields include:

373 - Affiliation - extend the field to contain names of associated institutions for corporate bodies and rename field Associated Institution (proposed)
374 - Occupation
375 - Gender
376 - Family Information

In addition, catalogers can add notes to point out details not available elsewhere in the record, such as explaining that an annual conference alternates between two locations.

RDA has simplified choice of main access point for a treaty, which is now the jurisdiction named first in the treaty itself.

There wasn't enough time for all of the examples Lia had prepared, but the speakers intend to make their program slides available on the TS-SIS website at http://www.aallnet.org/sis/tssis/annualmeeting/2011/handouts/.

Continued from page 1

may feel that we first must have *X* in order to contribute something meaningful. Listening to the speakers made me realize, however, that we already have the requisite tools; sometimes it simply takes someone else to nudge us into action. At the CONELL workshop, our wonderful AALL leaders emphatically encouraged participation in any form and at any level: it's perfectly acceptable to start small, thereby gaining confidence for bigger opportunities in the future.

Later, we split into groups for two activities: a speed networking session and a visit to the AALL Marketplace. The speed networking event (much like speed dating but without the anxiety) was an excellent warm-up for the conference, and I was able to meet, chat, and exchange cards with lots of other librarians. In a sea of public services librarians, I felt an instant camaraderie each time I encountered another technical services librarian, and we would find ourselves talking well past our allotted three minutes about publishing trends, invoicing practices, and workflows. Discussion lists and online forums have their place, but nothing beats an old-fashioned, face-to-face discussion between colleagues. Just as I started to panic at my dwindling supply of business cards, the volunteers announced a switch. Our group's next stop was the AALL Marketplace, staffed by SIS members and brimming with informative brochures and goodies. At this small-scale version of the exhibit hall, CONELL attendees honed their browsing and networking skills while learning more about the various sections of AALL and what each had to offer.

A delicious lunch was followed by a tour of Philadelphia's main attractions via an air-conditioned bus. My seatmate, who had just moved to Philadelphia a few months prior, pointed out neighborhoods and museums of interest that she had recently discovered. That evening, I joined three other workshop attendees for dinner at El Vez, a fantastic restaurant not far from the convention center. As we chatted about our day and the upcoming conference, I was reminded of something a workshop speaker had stated and which I paraphrase here: CONELL is not only an opportunity to learn from others but a chance to bond with our colleagues— over things like awkward yet sincere introductions, "speed" networking, and the nervous excitement that comes with participating in an organization like AALL. Without a doubt, my CONELL experience was the high point of the conference, and I can't recommend it enough to new law librarians. A warm thank you to TS-SIS, for sponsoring my attendance!

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