There were about 130 in the large room to hear Marshall Breeding’s hour-long presentation about e-books and their impact on library collection development strategies, budget adjustments, circulation, and technical services. This report contains much of the language found in the PowerPoint slides from this presentation.

Marshall Breeding is an independent consultant, speaker, and author. He is the creator and editor of Library Technology Guides and the lib-web-cats online directory of libraries. His monthly column “Systems Librarian” appears in Computers in Libraries. He is the editor of the American Library Association’s Smart Libraries Newsletter, and the author of the annual “Automation Marketplace” feature published by Library Journal since 2002. He has authored nine issues of ALA’s Library Technology Reports, and written many other articles and book chapters. He edited or authored seven books, including Cloud Computing for Libraries, published in 2012 by Neal-Schuman, now part of ALA TechSource. He regularly teaches workshops and gives presentations at library conferences on a wide range of topics.

Marshall Breeding held a variety of positions for the Vanderbilt University Libraries in Nashville, TN from 1985 through May 2012, including Director for Innovative Technologies and Research and Executive Director of the Vanderbilt Television News Archive. He was the 2010 recipient of the LITA/Library Hi Tech Award for Outstanding Communication for Continuing Education in Library and Information Science. His “Guideposts” blog on Library Technology Guides is at http://www.librarytechnology.org.

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2012-2013 Officers, Committee Chairs, and Representatives

TS-SIS

Chair:
Miriam Childs
Law Library of Louisiana

Vice Chair/Chair-Elect:
Brian Striman
University of Nebraska

Secretary/Treasurer:
Hollie White
Duke University

Members-at-Large:
Richard Paone (2011-2013)
Pennsylvania State University
Cindy Spadoni (2012-2014)
UCLA

Acquisitions Committee:
Trina Holloway
Georgia State University

Awards Committee:
Chalmer Chattoo
University of Miami

Bylaws Committee:
Ismael Gullon
Mercer University

Cataloging & Classification:
George Prager
New York University

Education Committee:
James Mumm
Marquette University

Membership Committee:
Suzanne Graham
University of Georgia

Nominating Committee:
Jen Richter
Sacramento County Law Library

Local Systems Committee:
Lauren Seney
College of William and Mary

Serials Committee:
Wendy Moore
University of Georgia

Professional Development Committee:
Aaron Kuperman
American University

OBS-SIS

Chair:
Christina Tarr
University of California, Berkeley

Vice Chair/Chair-Elect:
Katrina Piechnik
Jenkins Law Library

Secretary/Treasurer:
Barbara Szalkowski
South Texas College of Law

Members-at-Large:
Marjorie Crawford (2011-2013)
Rutgers University
Corrine Jacox (2012-2014)
Creighton University

Education Committee:
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University of California, Berkeley

Local Systems Committee:
Marjorie Crawford
Rutgers University

Nominating Committee:
Betty Roeske
Katten Muchin Rosenman LL

OCLC Committee:
Karen Selden
University of Colorado Boulder

Web Advisory Committee:
F. Tim Knight
York University

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Send Us a Message
Online Bibliographic Services Special Interest Section

It seems like there’s a lot going on around here. For one thing, AALL migrated our website, http://www.aallnet.org/sis/obssis/, to a new server. It doesn’t seem to have affected anything that I can see, but we (really it’s Tim Knight, our webmaster) have taken this as an opportunity to start making a few changes and freshening things up. Please check in now and then to see what we’re up to – we’d appreciate any feedback you might have.

We had a very successful Annual Meeting this year in Boston. We certainly want to repeat that next July in Seattle. The Annual Meeting Programming Committee has shaken up the way programs are to be submitted and evaluated. Programs are to address topics of interest to AALL members, as demonstrated in a survey: http://www.aallnet.org/conference/education/future-meetings/program-proposers/survey. We have yet to see how we will be able to get the programming we want in the new format.

Finally, Katrina Piechnik, OBS vice chair, is heading a committee to come up with a new strategic plan for OBS-SIS. The last strategic plan was voted on in 2006 and was designed to carry us through 2010. It is time to draft a new one for the next five years. The committee is composed of OBS Past Chair Betty Roeske, Georgia Briscoe, Michael Maben, Keiko Okuhara and me. The plan is to examine the current OBS Strategic Plan at http://www.aallnet.org/sis/obssis/about/strategicplan.htm, the Association’s current plan at http://www.aallnet.org/main-menu/Leadership-Governance/strategic, and other relevant strategic planning documents to come up with a draft plan by March 1, 2013. The plan will then be shared with the membership for feedback (due back April 1), with feedback incorporated by May 1. The revised draft will be then be sent out May 1 for member review, to be voted on at the July 2013 Annual Meeting.

The immediate challenge, though, is to ensure that we will have a successful Annual Meeting next year in Seattle. The deadline for program proposals is October 15. Let’s take a look at the survey and see how we can use it to come up with great programs for Seattle!

Chris Tarr
University of California, Berkeley

Technical Services Special Interest Section

“May you live in interesting times.” Turns out this malediction is neither ancient nor Chinese, but nonetheless resonates with anyone feeling the stresses of daily living. Those who attended this year’s Annual Meeting in Boston heard about changes to the way the Annual Meeting Program Committee (AMPC) selects programs for the conference and new methods of meeting educational needs. These changes will likely impact technical services-specific programming at the meeting.

The theme for next year’s conference in Seattle is “Rethink Your Value.” The most important program selection changes include the following:

- Those proposing programs will not choose a sponsor, and sections/caucuses will not rank program proposals. Instead, AMPC will blindly review each proposal and evaluate whether it meets one of the educational needs revealed by the AMPC survey distributed in July. This survey, which closed on August 10, was intended to identify the membership’s most pressing educational needs.
- Each section/caucus will sponsor only one program not selected by AMPC.
- Each section/caucus will have ten meeting slots at the annual meeting. These slots do not include meetings with a meal component, but do include business meetings, committee meetings, and roundtables.
AMPC adopted the changes in response to Velvet Chainsaw Consultants’ (VCC) study of the dynamics of AALL’s Annual Meeting. The report concluded attendees feel there are too many meetings, leaving them exhausted, rather than invigorated, at the end of the conference. VCC’s report was fairly negative toward SIS meetings and programs, so AMPC isn’t following their recommendations exactly. In other words, it could’ve been worse.

Please log in to AALL Communities to read the VCC report and the TS-SIS response.

- VCC report: http://community.aallnet.org/AALLNET/Communities/Resources/ViewDocument/?DocumentKey=7642f2a6-c71b-4852-b349-8f3d7f98f8b0
- TS-SIS response: http://community.aallnet.org/AALLNET/Communities/ViewDiscussions/Message/?MID=3255

AMPC will issue a call for program proposals in early September, with a deadline of October 15. The survey results will be released in roughly the same time frame. Though TS-SIS will not sponsor any programs (except the one slot reserved for proposals AMPC didn’t select) or rank proposals, the Education Committee will solicit education ideas from the TS membership. As in years past, the Committee will assist those who propose a program to fully develop (“curate”) the program’s description and learning objectives. Starting this year, however, the TS-SIS AMPC liaison will play a prominent role in supporting the development process.

Technical services librarians know the value of our work. This year’s challenge is to submit proposals that meet the educational needs of our section’s membership and satisfy at least one need identified by the AMPC survey. The Education Committee is waiting to hear from you. After AMPC makes the call for program proposals, send your proposals to Jim Mumm, Chair of the Committee (james.mumm@marquette.edu). I’m certain that we’ll get through these interesting times together.

Miriam Childs
Law Library of Louisiana

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**TSLL Annual Report**
**Covering July 2011-July 2012**


Virginia Bryant completed her fourth year as *TSLL*’s editor-in-chief, always grateful for excellent assistance provided by Cindy May, associate editor; Julie Stauffer, layout and design; and Martin Wisneski, web manager. This year, Michele Thomas joined Cindy as associate editor to learn the ropes, and she will take over full associate editor responsibilities following the September conference issue. Each issue this year 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 50 entries since July 2011 to keep readers current on the latest news and technology trends.

Several columnist changes occurred throughout this year. The December issue featured new columnists Karen Nuckolls (Collection Development), Mary Lippold (Management), Karen Selden (OCLC), and Erin Harper, who joined Allison Rainey as co-columnist for Private Law Libraries. In March, Ashley Moye joined Robert Bratton as co-columnist for Description & Entry, as the column increased focus on issues relating to Resource Description and Access. Maxine Wright assumed responsibility for the Preservation column from long-time columnist Sally Wambold. *TSLL* was sorry to lose Kate Wilko’s insights on classification but appreciates Lia Contursi continuing her contributions to the column. All continuing columnists deserve thanks for the outstanding effort they put into their columns to keep *TSLL*’s readers well-informed.

In addition to the regular columns, volume 37 included two special articles by George Prager recounting his sabbatical adventures in China and at LC. The September issue featured program reports from AALL’s Annual Meeting in Philadelphia, 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, implemented a new product, or changed workflow—share the experience with your colleagues!

*TSLL* via AALL has a three-year agreement in place with Hein to include *TSLL* in HeinOnline. The agreement will automatically renew at the end of 2012 for successive one-year terms unless cancelled in writing by either party. As part of the HeinOnline collection, *TSLL* is available in both “Spinelli’s Law Librarian’s Reference Shelf” and “Law Journal Library.”
After four years at the helm, I asked the TSLL Editorial Board to search for a successor editor-in-chief. I think the ideal plan would be to work with a successor, and then pass-the-baton, as has been done successfully this year with the associate editor position. Please contact Michele Thomas, Search Committee Chair and TSLL associate editor at hmthomas@ualr.edu if you are interested in the position.

Thank you to Gwen Gregory, Janet Hedin, Marilyn Nicely, and Lorna Tang who’ve served on the TSLL Editorial Board this year. It’s been my pleasure to work with them, the columnists, the TechScans contributors coordinated by Corinne Jacox, and the TSLL staff.

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

Technical Services Special Interest Section
2012 Annual Business Meeting
July 22, 2012 – Boston, Massachusetts

Call to Order
Ismael Gullon called the meeting to order at 5:15 p.m., and Elaine Bradshaw verified the quorum.

Welcome and Announcements
Ismael Gullon introduced Paul Frank, the 2012 TS-SIS VIP. Frank spoke at the pre-conference workshop “RDA for Law Catalogers” and the TS-SIS program “Creating Legal Subject Headings.” Gullon also recognized first-time AALL attendees.

Approval of the Minutes of Last Business Meeting
Pat Sayre-McCoy moved to accept the minutes from the July 24, 2011 business meeting in Philadelphia. Alan Keely seconded and all approved.

Secretary/Treasurer Report – Elaine Bradshaw
Secretary/Treasurer Elaine Bradshaw reported that as of the March 31, 2012 quarterly financial report from AALL, TS-SIS had a balance of $18,095.07. Activity since that statement included $810 in revenue from the Duplicate Exchange program and $1,144.99 in expenses. The projected balance for July 2012 is $17,760.08 and does not include any expenses for the 2012 Annual Conference.

TS-SIS held its election for new Executive Board members in April 2012 and had a 31% participation rate. The newly elected officers are: Brian Striman, vice chair/chair-elect; Hollie White, secretary/treasurer; and Cindy Spadoni, member-at-large. A special bylaws election was held in June 2012. Two amendments added language requiring membership in TS-SIS in order to serve on a TS-SIS committee. Both bylaws amendments passed.

Members-at-Large Reports
Suzanne Graham, second-year member-at-large, administered the program evaluation surveys following the 2011 Annual Meeting. She compiled the results and forwarded them to the speakers and the Education Committee. She also planned the Joint TS/OBS/RIPS/CS reception at the 2012 Annual Meeting. The reception was successful and Innovative was pleased with the turnout. She also chaired the ad-hoc group that drafted the official TS-SIS response to the Velvet Chainsaw Consulting report on the 2011 Annual Meeting.

Richard Paone, first-year member-at-large, reported on his work with Vice Chair Miriam Childs on the biennial membership survey. He also organized the TS-SIS Silent Auction to benefit the Marla J. Schwartz Grant.

Vice Chair/Chair-Elect Report – Miriam Childs
Miriam Childs worked on the annual volunteer survey and the biennial membership survey. She used the volunteer survey to pick new TS-SIS committee chairs and will use data from the biennial membership survey to help design educational programming to meet membership needs.
Chair Report – Ismael Gullon

Ismael Gullon reported on the TS-SIS booth at the CONELL marketplace. Attendees were able to pick up brochures and candy, and to register for a $25 Amazon gift card drawing. There will also be a gift card drawing at the TS-SIS table in the exhibit area.

Gullon then spoke about the SIS Council meeting he attended. There are still many unresolved issues regarding programming for the Seattle meeting in 2013.

Finally, he thanked Martin Wisneski for his work on the TS-SIS website and announced that both TS-sponsored programs at the 2012 Annual Meeting (“Creating Legal Subject Headings,” and “The Accidental Archivist”) will be videotaped and posted on the TS-SIS website.

Standing Committee Chair Reports

Acquisitions Standing Committee Report – Eric Parker

Parker discussed ongoing projects, including the cancellation survey that the committee conducted in May 2012. They received 236 responses and plan to share the information with the larger law library community.

Cataloging and Classification Standing Committee Report – George Prager

Prager reported that much of the committee’s work was on the RDA pre-conference workshop. Suzanne Graham led the effort to coordinate a law SACO Funnel Project.

Preservation Standing Committee Report – Sally Wambold

The Preservation Committee sponsored a photography contest for the Worst Book Ever. The winner of the $150 prize, Oklahoma City University Law Library, was announced at the TS-SIS activities table. Committee members will also be on hand at the activities table to answer preservation questions.

Serials Standing Committee Report – Wendy Moore

Moore reported that 27 libraries participated in the Exchange of Duplicates program, which had a net income of $540 for the year.

TSLL Report – Virginia Bryant

Virginia Bryant reported that volume 37 had 4 issues and all issues were out on time. Sixteen volunteers will be contributing articles about 2012 Annual Meeting programs for the September issue. Bryant thanked Associate Editor Cindy May; Julie Stauffer, Layout and Design; Martin Wisneski, Web Manager; Corinne Jacox, TechScans Coordinator; George Prager for his special articles, and all of the columnists. She announced that Michele Thomas joined TSLL as Associate Editor, and is currently working with Cindy May. Thomas will take over full responsibilities after the September issue. Bryant also announced that she will be stepping down as Editor-in-Chief. Michele Thomas is chairing the search for a new editor-in-chief.

Old Business

TS-SIS Strategic Directions – Approval

Ismael Gullon thanked the Strategic Directions Subcommittee for their work. Their draft was submitted to the TS-SIS Executive Board and was posted on the TS-SIS website in June.

Wendy Moore moved to approve the Strategic Directions 2012 document. Eric Parker seconded and all approved.

New Business

No new business was put forward.

Awards – Michael Maben

Marla J. Schwartz Grant

Maben announced Michael Umberger, University of Washington, as the recipient of the 2012 Marla J. Schwartz Grant. The grant has been awarded every year since 2007 and is used help newer law librarians and graduate students in library/information studies programs to attend AALL-sponsored educational events.

Renee D. Chapman Memorial Award

Yael Mandelstam presented the 2012 Renee D. Chapman Memorial Award to George Prager, Head of Cataloging and Assistant Professor at the New York University Law School Library. Mandelstam detailed Prager’s numerous contributions,
both within law cataloging and in the broader cataloging world. Prager was AALL’s representative to MARBI for five years, co-chaired or chaired several PCC task groups, and served on numerous TS-SIS task groups and committees.

Words of Appreciation – Ismael Gullon

Ismael Gullon presented two certificates of appreciation: the first to Jolande Goldberg for her longstanding contributions to law librarianship, and the second to Cindy May for dynamic service and contributions as the TSLL Business Manager and later as Associate Editor.

Investiture of the New TS-SIS Chair

Ismael Gullon said that he had a rewarding and challenging year as the TS-SIS Chair. He then introduced the new TS-SIS Chair Miriam Childs and presented her with the gavel. She in turn presented him with a certificate of appreciation and thanked him for his service.

Comments from the New Chair

Miriam Childs introduced the new TS Executive Board and Standing Committee chairs.

Jim Mumm, Education Committee chair, discussed changes in programming that will be implemented with the 2013 Annual Meeting in Seattle. Jim strongly encouraged TS-SIS members to fill out the AMPC survey currently underway. AMPC is seeking to identify major trends and concepts through the survey and will use the results to develop programming for the 2013 meeting. They will be taking more of an advisory role, and will be soliciting programming on specific topics. The call for proposals will go out in September and will have a deadline of October 15. AMPC will use a blind approach in evaluating program proposals and will not use SIS ranking or sponsorship in the evaluation. Also, each SIS will be limited to 10 meeting slots.

The meeting adjourned at 6:20 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 7, 2012

Online Bibliographic Services Special Interest Section
2012 Annual Business Meeting
Sunday July 22, 2012 – Boston, MA

Chair Betty Roeske called the meeting to order at 12 noon.

Officers’ Reports

Secretary/Treasurer Barbara Szalkowski gave the election and treasurer’s reports. Barbara summarized the written report that was distributed to members at the meeting. An online election was held March 1-15, 2012 using AALL’s electronic voting software. 83 votes were cast from a pool of 296 eligible voters (a 28% return rate). The following were elected for the 2012-2013 term:

Vice Chair/Chair-Elect – Katrina Piechnik, Jenkins Law Library
Member-at-Large – Corinne Jacox, Creighton University.

As of March 31, 2012, the balance of the OBS account stood at $7,485.38.

The minutes of the 2011 Business Meeting were approved as published in TSSL v. 36, no. 1 (September 2011).

Member-at-Large Karen Nuckolls (2010-2012) reported that the OBS brochure was updated to remove mention of the TSLL editor, and reported on the OBS activities table. The flashlight key chains purchased this year have a small piece of cardboard between the bulb and the battery that has to be removed before the flashlight will work. Marjorie Crawford will take the box of activities table items home after the meeting.
Member-at-Large Marjorie Crawford (2011-2013), reported on the Joint Reception, which took place on Saturday evening at an outdoor patio near the Pool and Fitness Center at the Sheraton, and was very well-attended. The event ran out of beverage tickets and cake, but people stayed to talk well after the scheduled end time of the reception.

Vice Chair/Chair-Elect Christina Tarr reported that she received 23 responses to the annual member survey. She also reported on the new structure for the AALL meeting in Seattle in 2013: SIS’s will be limited to ten Committee meetings and one SIS-sponsored program, and AMPC will no longer guarantee its acceptance of at least one program proposal from each SIS. Chris will post links to the AALL response to the Velvet Chainsaw Consultants (VCC) report and to the SIS responses on the OBS website.

Marjorie Crawford, representative to AMPC for 2013, reported that AMPC is hoping to have more programs with collaborative, team-learning formats, as opposed to the traditional lecture format. The 2013 AMPC Education Program has set up a blog on AALLNET where members are encouraged to post comments, suggestions, etc.

Bettye Roeske noted that the program “Guerrilla Usability Testing” had only about ten empty chairs, and people were taking notes. OBS sponsored three AMPC programs and one OBS program.

Betty Roeske represented OBS at the CONELL activities marketplace on Saturday. Approximately 35 people stopped by the OBS table, which provided copies of the OBS brochure and flashlight key chains.

**TSLL Report**

Editor Virginia Bryant provided a written report. She noted that all four issues of Volume 37 were completed on time. Associate Editor Cindy May worked with Michele Thomas, who will take over as Associate Editor after the September conference issue. Virginia thanked Layout & Design Editor Julie Stauffer and Web Manager Martin Wisneski for all of their excellent work. She noted that the TechScans blog has something new posted every week. New TSLL columnists included Karen Nuckolls, Collection Development; Mary Lippold, Management; Karen Selden, OCLC; Erin Harper (joining Allison Rainey), Private Law Libraries; and Ashley Moye (joining Robert Bratton), Description and Access. Currently all the columnist positions are filled, but feature article submissions are always welcome. The HeinOnline contract will now be ongoing, as TSLL has completed its three-year initial contract. Contact Michele Thomas (hmthomas@ualr.edu) if interested in the Editor-in-Chief position.

**Committee Reports**

**Local Systems.** Chair Marjorie Crawford reported that Marshall Breeding will be speaking at the Roundtable program, “What Does the Next Generation System Look Like?” at 1:15 p.m. on Monday July 23. There will also be a User Groups program on RDA on Tuesday at 10:15 a.m. on Tuesday July 24.

**Nominations.** Chair Pat Sayre-McCoy reported. Her committee members included Chalmer Chatto, University of Miami; Pam Deemer, Emory University; and, Brian Striman, University of Nebraska-Lincoln. Pat reported that the committee was able to secure four excellent candidates for the two positions.

**Joint Research Grant.** Chair Hollie White submitted a written report. An online application form for the grant on the committee’s website is pending. No one applied for a grant this year.

**OCLC.** Chair Karen Selden submitted a written report. The OCLC Committee program will be Monday July 23 at 2:45 p.m., with Glenn Patton of OCLC speaking. Karen reported that with the AALLNET upgrade, only AALL members can post, so Glenn is sending his messages to Karen to post for him. The OCLC Committee now has its own community discussion list. Karen is also writing the TSLL OCLC column.

**Web Advisory.** Chair Tim Knight reported that up to now, work on the website has been more reactive than proactive. Tim has been in touch with members of the Board about refreshing/updating the whole site. There will be a new AALL platform sometime after the Annual Meeting/in the next few months. Tim hopes to be able to provide online forms on the new platform.

**Chair’s Remarks**

Outgoing Chair Betty Roeske remarked that the year had been eventful. She thanked Pat Sayre-McCoy for sending a diplomatically-worded OBS response to the Velvet Chainsaw Consultants (VCC) report and presented Pat with a certificate and gift for her efforts. Betty also recognized outgoing Board members Kathy Faust and Karen Nuckolls for their service, and presented them with tokens of appreciation. Betty then passed the OBS leadership cap to incoming chair Christina Tarr. Betty solicited pins from all the past OBS chairs to put on the hat, and the following responded with a pin: Jack Bissett, Washington & Lee; Georgia Briscoe, University of Colorado; Susan Goldner, University of Arkansas at Little Rock; Ismael
Gullon, Mercer University; Richard Jost, University of Washington; Mary Jane Kelsey, Yale Law School; Michael Maben, Indiana University; Pat Sayre-McCoy, University of Chicago; Ellen McGrath, University of Buffalo; Betty Roeske, Katten Muchin Rosenman; Brian Striman, University of Nebraska-Lincoln; and, Sally Wambold, University of Richmond. Betty asks that each future Chair add his/her own distinctive pin before passing on the hat.

New Chair Christina Tarr announced the committee chairs for 2012-2013: Local Systems, Marjorie Crawford; Nominations, Kathy Faust; Joint Research Grant, Hollie White (Melanie Solon will continue as a member of this Committee and Merri Hartse will be a new member); OCLC, Karen Selden; Web Advisory, Tim Knight; Education, Christina Tarr; TSLL Representatives, Marilyn Nicely and Victoria Sukhol; MARBI Representative, Pat Sayre-McCoy; and SAC Representative, Ellen McGrath.

The OBS Education Committee will meet Tuesday July 24 at 7:00 a.m. The AMPC Open Forum will be at noon on Monday July 23.

Christina is also looking for suggestions on the OBS VIP for the Annual Meeting in Seattle in 2013. Joseph James, MLIS professor in Seattle, WA, was suggested since he is close by and has written for Library Journal on technology issues.

Christina also announced it is time to renew the OBS Strategic Plan. Chris and Vice Chair/Chair-Elect Katrina Piechnik had a preliminary meeting at which Katrina agreed to serve as Chair of the Strategic Planning Committee. They are seeking more volunteers. Chris hopes to have a draft ready to present to the OBS membership at the Seattle meeting in 2013.

Chris adjourned the meeting at 1:10 p.m.

Respectfully submitted
Barbara Szalkowski
August 14, 2012

Report of the AALL Representative to the ALA Committee on Cataloging: Description and Access, 2011-2012

ALA Midwinter Meeting, Dallas, TX, January 2012
ALA Annual Conference, Anaheim, CA, June 2012

John Hostage
Harvard Law School Library

Primary contact (at ALA): Peter Rolla, chair

The work of CC:DA (http://www.libraries.psu.edu/tas/jca/ccda/) 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 (http://www.rdatoolkit.org/) was released two years 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. Some libraries have begun applying RDA on at least a partial basis, and the three national libraries in the U.S. (LC, NLM, NAL) announced this spring that enough progress had been made on the improvements they demanded a year ago that they can implement RDA in March 2013 (http://www.loc.gov/catdir/cpso/news_rda_implementation_date.html). Among those improvements is rewording the text of RDA for greater clarity and readability. Several chapters have been done already and should be published in the RDA Toolkit later this year. Another condition for adopting RDA was the development of a new bibliographic framework to replace the MARC format, which was identified as a requirement to take full advantage of RDA. The Library of Congress is leading an effort called the Bibliographic Framework Transition Initiative (http://www.loc.gov/marc/transition/) to accomplish this goal and has hired an outside consultant to develop an initial model.

CC:DA continues to study proposals for revisions to RDA. The AALL proposal concerning the rules for certain place names, which was first introduced in 2010, has continued to undergo review by the committee; it is close to getting final approval and being sent on to the Joint Steering Committee for Development of RDA (JSC). The AALL representative also served on a couple of CC:DA task forces, including one to review the use of the Chicago Manual of Style in RDA and one to revise the document Building International Descriptive Cataloging Standards (http://www.libraries.psu.edu/tas/jca/ccda/building.html).

There are some issues in RDA that still concern law librarians. One of the big changes introduced in RDA has to do with the entry of treaties. Many multilateral treaties that were entered under title according to AACR2 will be entered under the first-named signatory to the treaty under RDA. Although this is consistent with the treatment of other works in RDA (if treaties can be considered collaborations among various signatories), the result is troubling to law catalogers. In addition, it is not
always easy to determine the first-named signatory, nor are the sources consistent. The continued use of the uniform titles (or, as they are now known, “preferred titles”) “Laws, etc.” and “Treaties, etc.” has been questioned. The law cataloging community has not reached consensus about whether to pursue changes to RDA in these areas.

AALL MARBI Representative Report, 2011-2012
July 30, 2012
Patricia Sayre-McCoy
University of Chicago D’Angelo Law Library

The Machine-Readable Bibliographic Information Committee (MARBI) is an interdivisional joint committee of the American Library Association (ALA). MARBI 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, who make up the MARC Advisory Committee, 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.

At its meetings, MARBI decides on actions to take on the discussion papers and proposals that have been presented. The discussion papers are the first step to suggesting changes in the MARC21 format. They explain the need for a new field or subfield and then indicate which new or revised fields should be added to the MARC format. MARBI decides whether to request proposals based on the discussion papers for the next ALA meeting. When those proposals are submitted, MARBI votes to either reject them, request revisions which will then be reconsidered, approve them, or approve them as amended. If a proposal is approved, the changes will be included in the next revision to the online version of MARC21, which usually occurs annually.

The previous representative, George Prager, attended the ALA annual meeting in June 2011, held in New Orleans. I took over as representative to MARBI at the ALA midwinter meeting, held in Dallas January 21-24, 2012.

MARBI Meeting at ALA Midwinter, January 21-24, 2012

Proposal No. 2012-01: New Data Elements in the MARC 21 Bibliographic and Authority Formats for Medium of Performance
http://www.loc.gov/marc/marbi/2012/2012-01.html

This was the only proposal discussed at the meeting. It addressed the need for more specific encoding for medium of performance in the MARC 21 Bibliographic and Authority Formats, beyond the data that is currently recorded in subject headings. This would be useful for music catalogers. It proposed expanding MARC field 382 to add greater specificity, add an indicator for whether the data is complete or partial, and add subfields for soloists, doubling instruments, and number of performers. Because of the different terminology and granularity of RDA and the expanded field, it may be necessary to repeat the field for separate vocabularies and usage requirements. The proposal was approved with amendments that defined the indicator values and renamed some subfields to be more in accord with other subfields for similar information elsewhere in the MARC record.

Discussion Paper No. 2012-DP01: Identifying Titles Related to the Entity Represented by the Authority Record in the MARC21 Authority Format
http://www.loc.gov/marc/marbi/2012/2012-dp01.html

This paper concerns authority field 670, which is used to record the source of information about the entity the record represents. It is usually a bibliographic citation, although other information such as phone calls and personal communications are also recorded in this field. It is also used to note that the entity is NOT the author of some other title when it would otherwise appear to be. Thus the 670 contains a mixture of data elements, and it was proposed that they be separated into multiple fields. Part of the discussion centered on whether only titles related to the author should be included or if subject relationships could also be added (and how to distinguish them). Members preferred that all FRBR levels (work/manifestation/ expression/item) be allowed, rather than only records for works. Titles that dealt with Romanized/vernacular pairings and journal article titles are also problematic and may be included in authority records. MARBI asked that the paper be turned into a proposal for its meeting at ALA Annual in June 2013.
Future of MARBI

Most of the second session was a discussion of the future of MARBI and of its relation to the development of a new bibliographic environment, commonly referred to as the “replacement of MARC.” The new bibliographic environment will include information on permissions for use of materials and preservation information, as well as bibliographic description and holdings data. The Resource Description Framework (RDF), on which the new bibliographic environment will be based, emphasizes linked data instead of individual cataloging records. One of the issues discussed is that MARBI is really a subgroup of the MARC Advisory Group which was formed to advise the Library of Congress on changes to the MARC21 formats. As such, expanding the scope of the group is problematic and the future of MARBI is unclear. It was decided that for now members should participate in the development of the new bibliographic environment as individuals. MARBI will continue to work on supporting MARC until the transition to the new bibliographic framework, and continue to develop new fields and subfields as new needs emerge. At some point, MARC will be a legacy system.

MARBI Meeting at ALA Annual, June 23 and 24, 2012

The agenda for the summer MARBI meeting was very long and not completed in the two meetings scheduled. The first item on the agenda was an announcement from ALCTS (ALA's Association for Library Collections & Technical Services) saying that although they recognized the importance of the work of MARBI, its close collaboration with the MARC Advisory Committee had diverted the attention of ALCTS from other aspects of its charge. With the move to a new bibliographic framework, there is less need for this kind of work, and consequently MARBI will be dissolved at the end of the 2013 ALA Annual Meeting. A joint ALCTS-LITA (Library Information Technology Association) Metadata Standards Committee, with liaison from RUSA (Reference & User Services Association), will be formed at that time. The charge for the new committee is basically the same as MARBI’s. Other MARBI representatives will work with their organizations to review their status.

Proposals

Proposal No. 2012-02: Identifying Titles Related to the Entity Represented by the Authority Record in the MARC21 Format
http://www.loc.gov/marc/marbi/2012/2012-02.html

This proposal called for creating a new field, 672, to list titles that are related in some way to the entity represented by the authority record, and also titles known not to be related to it. The proposal assumes that most of this information would be used to assist programs and operators to identify titles and not recreate a bibliography. The titles would only be added as they were discovered and there would be no requirement or encouragement to make an exhaustive list. This information was previously included in the 670 but having it in a separate field makes it easier to manipulate by a program. So a 670 note that said “author of [title]” would now have a 672 for that title. Much time was spent discussing the need for subject information in this proposal, but enough people thought the purpose of the subject information was not clear and not necessary and should be removed. It was decided to revisit this proposal at the ALA Midwinter meeting in 2013.

Proposal No. 2012-03: Data Provenance in the MARC21 Bibliographic Format
http://www.loc.gov/marc/marbi/2012/2012-03.html

This proposal discussed documenting the data provenance of classification in the bibliographic record, limited to Dewey classification. The proposers wanted to document the source of classification numbers, either machine-generated or assigned by a cataloger, and some indication of the confidence of the assigning agency regarding the classification number. One option was to add subfields to the 082 (Dewey classification number), and the other was to create a new field, 883, for data provenance, that would be repeatable and linked to other fields using subfield 8. The new 883 field would not be limited to Dewey classification, but could be expanded to include other fields such as 6xx fields. A modified version of the second proposal to create a new 883 field was unanimously approved; the modifications included $u for URI, $a for name of other process (e.g., machine-generated) and $c for confidence value.

Proposal No. 2012-04: New Data Elements in the MARC21 Authority Format for Other Designation Associated with Person and Title of Person
http://www.loc.gov/marc/marbi/2012/2012-04.html

This proposal discussed how information on the title of a person was recorded only in $c in the 100 field and not recorded in a separate field. There is also inconsistency in the format of the $c: sometimes the term is parenthetical and sometimes not. Nowhere is this information separately recorded. The proposal suggested broadening field 368 (Other corporate body attributes) to include both corporate body attributes and designations relating to persons. There were two proposed changes; the one that was approved required the field name to be changed to “Other attributes,” $c to be redefined to include other designation associated with a person, and adding the new $d “Title of the person.”
Proposal No. 2012-05: Making the 250 Field Repeatable in the MARC21 Bibliographic Format
http://www.loc.gov/marc/marbi/2012/2012-05.html

This proposal addressed the need for a repeatable 250 field to accommodate edition statements for music. The proposal focused on music cataloging but did note that a repeatable 250 might be useful for cataloging other resources in RDA. With RDA some data that was recorded in the 254 field will now be recorded in the 250 field. According to the proposers, the 254 field (Musical presentation statement) is considered edition information in RDA, and so different types of information will be included in the 250. Proposers felt having only one 250 field will make it crowded and hard to interpret. Some discussion focused on whether the Musical presentation statement really did contain edition statements or information about different versions. If this is version information, it does not belong in the 250. The Committee decided that the presenters had not proved their case for the repeatable 250 and requested that a new proposal or discussion paper be resubmitted addressing these concerns.

Proposal No. 2012-06: Defining Subfield $c (Qualifying information) in Field 028 (Publisher Number) in the MARC21 Bibliographic Format
http://www.loc.gov/marc/marbi/2012/2012-06.html

This proposal called for adding $c to publisher numbers to include qualifying information, such as (set) or (disc. 1), or the publisher name of materials with two publisher numbers—one from the label and one on the container. The proposal was amended to change $c to $q and was passed as approved. Expanding this subfield to the 020 was suggested as a Midwinter 2013 proposal.

Proposal No. 2012-07: Defining New Code for Vocal Score in Field 088/20 (Format of music) in the MARC21 Bibliographic Format
http://www.loc.gov/marc/marbi/2012/2012-07.html

This proposal was limited to vocal scores and actually proposed new subfields for different types of scores. It was approved as proposed.

Discussion Papers

http://www.loc.gov/marc/marbi/2012/2012-dp02.html

This paper discussed the options for new controlled vocabulary, currently being developed, consisting of medium of performance terms for music. Field 382 has already been defined in the bibliographic and authority formats. This proposal suggests a new set of authority format fields be defined for medium of performance because the 382 does not work in the same way as other controlled fields, such as the bibliographical format 100 or 650. There are questions about how well matching programs would work with the multiple terms that can be valid in 382 repeatable subfields. Currently subject headings (650s) containing medium of performance are not required to have authority records. The proposal suggests that having these terms under authority control is a good idea and suggested using the 142 or 152 fields. As this was a discussion paper, no action by MARBI was required.

Discussion Paper No. 2012-DP03: Chronological Aspects in the MARC21 Bibliographic and Authority Formats
http://www.loc.gov/marc/marbi/2012/2012-dp03.html

This discussion paper proposed some possibilities for recording the date or period of origin or creation for musical works. This information was previously included in subject subdivisions that will become obsolete with the adoption of the music form/genre terms that are being developed. The 045 field is not useful because it can’t include all the information about the creation date that is necessary. It was decided that the 045 field could be used for date or period of creation rather than just the chronological period of the material being cataloged, and that the 045 will be clearly distinguished from the 046 (special coded dates field). Any changes to the 046 in the bibliographic record would also be made in the authority record. Best practices for use of the 046 and 648 (subject added entry chronological terms) will need to be developed. As this was a discussion paper, no action by MARBI was required.

Discussion Paper No. 2012-DP04: Recording Audience Characteristics of Works and Expressions in the MARC 21 Bibliographic and Authority Formats
http://www.loc.gov/marc/marbi/2012/2012-dp04.html

This paper proposed adding a new 3xx field in the bibliographic and authority formats to provide information on the intended audience for a work or expression. Sometimes this information is included in subject headings or subdivisions, sometimes it
is combined with genre terms in subject headings, and sometimes it is only implied in subject headings. Currently audience is out of scope for inclusion in LCGFT (LC Genre-Form Terms) but it needs to be included somewhere in the record. Bibliographic field 022 (Target audience) is limited to eight broad terms, and there is no place to record this information in the authority record, although it could be useful in works records. The proposed 3XX field would include the category of persons for which a resource is intended and is not limited to age terms. It could include nationality terms, intellectual level of the material, explicit terms for people with disabilities, or other special interests or groups. A straw vote indicated approval of the idea to add a repeatable 3XX field. Although the 521 field was discussed, it does not include controlled vocabulary and would not be good for machine retrieval. Best practices could be developed to aid catalogers with vocabulary terms, which would not need to be in LCSH form. As this was a discussion paper, no action by MARBI was required.

Discussion Paper No. 2012-DP05: Recording Creator/Contributor Group Categorizations of Works, Expressions and Persons in the MARC21 Bibliographic and Authority Formats
http://www.loc.gov/marc/marbi/2012/2012-dp05.html

This paper discusses adding a new 3xx field for the group category of a creator/contributor. Currently this information may be included in subject headings or subdivisions, or implied in headings. Geographic terms to represent creators’ nationality or country of residence are also included as geographic subdivisions. All of this information may be lost when genre/form terms are used, because subdivisions are not permitted in genre/form terms, and categories of persons will not be included in LCGFT. Since it will still be useful to collate works by persons who share particular characteristics, a new field is necessary to contain some of this information. Existing 6xx fields, such as field 656 (Index term-occupation), are meant to be used for the occupations reflected in the resource, not those of the creator. The proposers believe that it is better to record this information in the one authority record for the creator instead of in all the bibliographic records linked to that creator. Some 3xx fields in the authority format contain some of this information, such as field 370 for Associated place, which can already include place of birth, place of residence, and associated country, and could be expanded to include nationality/regional group information. Other existing fields, such as the 371 (Field of activity) are less useful because they use terms that do not imply personhood, such as the name of a discipline. Field 374 (Occupation) is recorded in the singular, which patrons would probably not look for. (The subject headings are usually plural.) Furthermore, these fields in the authority format are defined for attributes of a person or corporate body rather than categories of persons. It was agreed that a repeatable 3xx field for Creator/contributor group characterization would be useful. As this was a discussion paper, no action by MARBI was required.

Report of the AALL Representative to the ALA Subject Analysis Committee

ALA Midwinter Meeting, Dallas, January 2012
ALA Annual Meeting, Anaheim, June 2012

Ellen McGrath
University at Buffalo Law Library

This is my first year as AALL’s Representative to the Subject Analysis Committee (SAC). Joining such a complex conversation in midstream is quite a challenge, so I want to extend my sincere thanks to Yael Mandelstam for helping me in my attempts to understand and navigate the content and logistics of the SAC meetings and the ALA conference as a whole.

To place SAC in context hierarchically, it is formally the American Library Association (ALA), Association for Library Collections & Technical Services (ALCTS), Cataloging and Metadata Management Section (CaMMS), Subject Analysis Committee. SAC has two subcommittees at present: the Subcommittee on Genre/Form Implementation (which I joined after Midwinter) and the Subcommittee on RDA.

SAC Subcommittee on Genre/Form Implementation

I attended my first of this Subcommittee’s meetings at ALA Annual about a month ago. This group is very active and I look forward to increasing my knowledge of genre/form as I participate in its work. I also attended the kickoff meeting of the Working Group on Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT) Literature Terms. I do not have a literature background, but I know I will learn a great deal by observing the process employed. The Literature Working Group includes representatives from public, academic, and research libraries as well as from cataloging vendors.

A resource document entitled Sources for Genre/Form Terms (http://www.loc.gov/aba/pcc/saco/documents/Genre-Form%20Reference%20Sources.pdf) was issued by the Subcommittee in February 2012. A related goal is to start drafting an LCGFT manual that can be modeled on the Subject Headings Manual (SHM) instruction pages.

Technical Services Law Librarian, September 2012
The Subcommittee prepared and presented three discussion papers to MARBI during ALA Annual in Anaheim. Through its work on the various discipline-based and general projects, the Subcommittee realized that in the process of replacing LC form subject headings with LC genre/form terms, some important aspects of the work or expression will be lost (e.g., the geographic and chronological aspects in the LCSH string “Constitutions-Pennsylvania-Early works to 1800” cannot be used with LCGFT “Constitutions,” since LC genre/form terms cannot be subdivided). These aspects or facets will need to be recorded elsewhere in bibliographic and authority records. The titles of the discussion papers available at http://www.loc.gov/marc/marbi/list-dp.html#2012 reflect this:

- Chronological Aspects in the MARC 21 Bibliographic and Authority Formats – 2012 DP03: http://www.loc.gov/marc/marbi/2012/2012-dp03.html

I was able to attend the MARBI meeting at which these papers were presented and found the discussion very interesting. All three papers were approved, so the Subcommittee will now turn them into MARBI proposals. This will be covered in the MARBI report, so I will not go into detail except for my observation of a few general, probably very obvious, themes:

- There is a constant interplay among the various ALA groups (MARBI, CC:DA, and SAC), the Joint Steering Committee for Development of RDA (JSC) and RDA itself.
- Data must be appropriately placed and granular enough to allow access and to enable migration and crosswalks.
- Free text vs. encoded data issues must be resolved.
- Facets that allow end users to refine searches are critical.
- References to linked data and semantic web implementation possibilities are frequent, thus assuring that all are looking to the future.

The Subcommittee continued to discuss two other aspects or facets:

1. Geographic origin of work/place of production, which also involves the concept of jurisdiction, an important aspect for law libraries. (This topic was scheduled to be discussed at the TS Cataloging and Classification Roundtable on Tuesday afternoon.)
2. Demonyms (the names for the resident of a locality or citizen of a country; for example, citizens of Canada are called Canadians). This paper was tabled rather than being pursued as a MARBI discussion paper, as it was felt there may be a linked data solution to associating Demonyms with genre/form terms.

Since the law genre/form terms have been approved and incorporated into the LCGFT, the focus is now on encouraging catalogers to apply the terms, both on new titles and retrospectively. Yael Mandelstam provided an update on the latter in her report to the TS-SIS Cataloging and Classification Standing Committee.

The Subcommittee formed a new working group to focus on a General Terms Project. Yael Mandelstam and Bruce Tabb will co-chair the effort. The project’s outcome will be a thesaurus of general-use genre/form terms that can be incorporated into the LCGFT.

A subgroup of the Subcommittee will begin to focus on the placement of genre/form terms in authority records for works and expressions. There was also discussion of other areas/disciplines that potentially need genre/form lists: video games, art, science, newspapers, and archival material.

**SAC Subcommittee on RDA**

This Subcommittee is charged with responding to subject-related proposals for revisions to RDA. Comments on such proposals are made by the Subcommittee and also the CC:DA. Both sets of comments are sent to the ALA representative to the JSC, John Attig, who uses them to formulate ALA’s official response. One proposal has followed this path so far. It was discussed at the November 2011 JSC meeting and this is JSC’s response:

“It was agreed that RDA is not intended to replace any subject indexing or classification system. In order for RDA to provide comprehensive guidelines and instructions covering all types of content and media, it is necessary to include the subject relationship and those entities that may be the subject of works. Library of Congress will prepare a follow-up discussion paper on these issues, including recommendations for object, concept, and place. It was also recognized that the properties of Object, Event, Time, and Place are not limited to the subject relationship. This is an issue with the underlying FRBR model, which JSC will raise with the FRBR Review Group.” (http://www.rda-jsc.org/1111out.html)
It was reported at Annual that the LC paper was done but then withdrawn. It was acknowledged that there are many gray areas associated with the recording of subject aspects in authority records for expressions.

SAC Research and Presentation Working Group

SAC also has a Research and Presentation Working Group, which I just volunteered to join. This latter group organizes a formal presentation for the first hour of each SAC Monday meeting. These were the two presentations this year:

- KO: Knowledge Organization, presented by Karen Coyle (Midwinter)
- It’s All About Discovery, presented by Diane Vizine-Goetz (Annual)

Library of Congress Updates

Here are some highlights excerpted from the Midwinter and Annual reports submitted by Janis Young, the liaison to SAC from the Library of Congress Policy and Standards Division (PSD). The full LC ALA reports are available at http://www.loc.gov/ala/.

General

- The Collection Development Office (CDO) has been established and Joseph Puccio appointed Collection Development Officer on March 26, 2012.
- There has been a complete overhaul of LC’s main web search on its website.
- After extensive discussion and focus groups, LC has decided not to obtain a webscale discovery system at present.
- LC’s online catalog has been redesigned using the Voyager “Tomcat” OPAC application.
- An e-books pilot began in October 2011, with four publishers participating. Through this new initiative, LC will provide quality metadata for use by the international library community for e-books that are simultaneously published in print.

Subject Cataloging & Classification

Publications

- New LCC schedule on Law of the Indigenous Peoples in the Americas (Classes KIA-KIX: North America) is currently in final draft stage after comments were received through May 20, 2012. More information was scheduled to be provided by Jolande Goldberg in her LC Update, and in Program J5 on Tuesday afternoon at 2:30.
- Other newly released schedules are KBS (Canon Law of Eastern Churches) and KBT (Canon Law of Eastern Rite Churches in Communion with Rome), which are being applied by the Law Section.
- Library of Congress Subject Headings (LCSH red books) 34th edition will be available in late summer 2012.
- Subject Headings Manual (SHM) Update No. 2 (2011) and Update No. 1 (2012) have been published.
- New Library of Congress Classification (LCC) schedules published: D-DR, History (General) and History of Europe; KZ, Law of Nations; L, Education; S, Agriculture. New LCC schedules due by end of summer: B-BJ, Philosophy. Psychology and Q, Science.

Staff Changes

- Mark Strattner retired as chief of the Law Library’s Collections Services Office on November 3, 2011.
- Judy Kuhagen, senior cataloging policy specialist, retired on December 31, 2011. She is now part-time secretary to the Joint Steering Committee for Development of RDA.

Law Reclass Projects: The Law Section reclassed about 800 international law titles from the K schedule to the new portions of the KZ schedule, with the assistance of Jolande Goldberg and George Prager. The Section also continued to reclassify the 554,927 volumes shelved under the legacy in-house LAW system, completing 24,697 titles, representing 41,887 volumes, during this year. Overall, over 59,980 titles have been reclassified though this project. The current focus is on Italy, Japan, and Russia.

“Orphan” LCSH: PSD has begun to investigate the possibility of adding broader terms (BTs) to categories of headings that are currently “orphans” – those headings which are not hierarchically related to any others. So far, headings for periodicals and newspapers qualified by nationality, language, or ethnicity have been provided with the BTs Periodicals and Newspapers, respectively. This work will bring LCSH into closer alignment with the American National Standards Institute/National Information Standards Organization (ANSI/NISO) standard for monolingual controlled vocabularies. It will also enhance the usefulness of LCSH in the semantic web environment. SACO members should not submit change proposals about this; only PSD will work on it at present.
**072 Fields in LC Subject Authorities Experiment:** PSD will begin an experiment to add subject category codes (MARC 21 tag 072) to authority records for subject headings, which will commence no earlier than August 2012. It is anticipated that the addition of this information will enhance the usability of LCSH on the semantic web, assist catalogers by allowing integrated library systems (ILSs) and resource discovery platforms to provide a list of the subdivisions that are appropriate to headings being assigned, and improve automatic heading string creation and validation in ILSs and resource discovery platforms. For the first time, subject authority records will include information that indicates into which of the 34 pattern and free-floating lists an individual heading falls. It is anticipated that computers will be able to match the data in the 072 field to the data in the 073 field (Subdivision usage) of the subdivision authority records and suggest applicable subdivisions for a heading, and even construct valid headings. This experiment is very limited in scope with only PSD subject specialists adding 072s. It was emphasized that 072s should not be added to NACO authority records or added to SACO proposals. For more detail, see [http://www.loc.gov/catdir/cpso/field_072_announcement.pdf](http://www.loc.gov/catdir/cpso/field_072_announcement.pdf).

**RDA’s Effect on Subject Analysis:** So far, PSD has identified two areas in which RDA access points could conflict with LCSH policy: family names and names of fictitious characters. Under AACR2, neither could be provided as descriptive access points; since RDA permits this practice, PSD has determined that in each case the subject and descriptive headings should coexist. The descriptive headings for family names and fictitious characters may not be used as subject headings. The analogous LCSH should be used instead.

**South Sudan:** PSD undertook a project to update LCSH and LCC to reflect the existence of South Sudan as an independent country. Approximately 200 LCSH had to be revised and a new classification span, DT159.915-159.978, was approved, as were revisions to the schedule for Sudan (DT154.1-159.9). A geographic cutter for South Sudan, S643, has been established and will be added to the Classification and Shelflisting Manual G300 table.

**Military Expeditions:** Military expeditions that are campaigns, battles, sieges, etc. should now be established in LCSH with MARC tag 150, while those that are not should be established in the name authority file using MARC tag 111.

**BISAC Terms:** Book Industry Standards and Communications (BISAC) subject headings were added to ECIP (electronic cataloging in publication) records this year, at the request of ECIP publishers. These headings are extracted automatically from the ONIX data created and supplied by the publishers. The CIP Group will explore adding other specialized vocabularies as the opportunity arises.

**New LCSH of Current Interest**
- Arab Spring, 2010-
- Egypt—History—Demonstrations, 2011-
- Genre/form terms, Library of Congress
- Libya—History—Civil War, 2011-
- Sexting
- Soldiers with disabilities
- Syria—History—Protests, 2011-
- Tunisia—History—Demonstrations, 2010-

**Genre/Form Terms**

**Moving Images Project:** Approximately 70 character- and franchise-based terms for moving images (e.g., Batman films; Star Trek television programs) were canceled on the Monthly List for February 2012 ([http://www.loc.gov/catdir/cpso/character_franchise_disposition_112211.pdf](http://www.loc.gov/catdir/cpso/character_franchise_disposition_112211.pdf)), and 22 sport-specific terms were canceled on the Monthly List for June 2012 ([http://www.loc.gov/catdir/cpso/genre_form_sports_terms_cancellation.pdf](http://www.loc.gov/catdir/cpso/genre_form_sports_terms_cancellation.pdf)).

**Cartography Project:** PSD issued the discussion paper, “Proposed Treatment of Globes in the LCGFT Environment” on May 24, 2012 ([http://www.loc.gov/catdir/cpso/genre_form_globes.pdf](http://www.loc.gov/catdir/cpso/genre_form_globes.pdf)).

**Music Project:** The Music Library Association (MLA) continues to partner with PSD to develop genre/form terms for music. Over 800 genre/form terms have been agreed upon and work on the development of hierarchies is underway. There is a separate, but related, project to develop medium of performance as a separate facet since that is out of scope for LCGFT, but requires a controlled vocabulary.

**Religion Project:** The partnership to develop the genre/form terms for religion between the American Theological Library Association (ATLA) and PSD continues. ATLA is finishing its first draft and expects to forward it to PSD fairly soon.
Literature Project: The SAC Subcommittee on Genre/Form Implementation has formed a Working Group on LCGFT Literature Terms and will partner with PSD on this project. PSD has begun the process of examining LCSH for subject headings that denote literary forms and genres. Approximately 400 LCSHs that are candidates for inclusion have been identified so far.

OCLC Update and Roundtable

Karen Selden
William A. Wise Law Library
University of Colorado Law School

The 2012 OCLC Users Roundtable was extremely well attended—the 50 seat room was filled to capacity—because there were no other TS or OBS programs scheduled during the same time slot. A member of the AALL Document Delivery Caucus even attended the program and was able to ask some relevant questions. AALL’s OCLC liaison, Glenn Patton, covered new developments with WorldCat, Worldshare Management Services, Connexion, RDA implementation at OCLC, and VIAF (Virtual International Authority File). Glenn’s PowerPoint slides are available on the OBS website at http://www.aallnet.org/sis/obssis/meetings/2012/2012-AALL-OCLC-Update1.pdf and on the TS website at http://www.aallnet.org/sis/tssis/annualmeeting/2012/handouts/oclcusersroundtable-patton.pdf.

Highlights of Glenn’s presentation include:

WorldCat

As of June 30, 2012, WorldCat contains over 273 million bibliographic records and over 1.85 billion holdings. Of those bibliographic records, over 73% were contributed by OCLC member libraries, while slightly less than 4% were contributed by the Library of Congress. As of July 2012, more than 60% of the bibliographic records in WorldCat were for non-English language materials. The top ten languages represented in the WorldCat database, in descending order are: (1) English, (2) German, (3) French, (4) Spanish, (5) Japanese, (6) Chinese, (7) Italian, (8) Russian, (9) Latin, and (10) Danish.

In December 2011, OCLC began to implement a project to control more headings in WorldCat. This project uses two separate but simultaneous workflows to update (1) the entire WorldCat database of existing bibliographic records as capacity allows; and (2) both newly added and changed/replaced master bibliographic records on a daily basis. The symbol OCLCO is added to the 040 $d to identify records that have headings controlled or modified by this process.

WorldShare Management Services

According to Glenn, WorldShare Management Services (WMS) is OCLC’s “shared infrastructure to manage and share resources across libraries and across communities.” This new web-scale product is designed to facilitate collaboration and app-sharing across the library community so that libraries can combine library-built applications, partner-built applications, and OCLC-built applications. Current Worldshare modules include Acquisitions, Circulation, Knowledge Base, License Manager, Discovery, Developer Network, and Platform. Future developments include Worldshare ILL, which will replace OCLC’s current resource sharing platform, and Worldshare Metadata. Worldshare Metadata, scheduled to be released within the next three years, will provide collection management and record management functionalities, offering complete metadata management for physical, licensed, and digital resources across multiple formats. Worldshare Metadata can be integrated with other WMS components, such as Acquisitions and Circulation, but it also will work with other integrated library systems if desired. One interesting feature of this product is that it will enable libraries to create customized sets of bibliographic records. For example, libraries could create customized sets of HathiTrust bibliographic records to fit their collection needs. The initial collection management functionality is currently in pilot testing, and should be more widely available later in 2012. During the question and answer period, attendees asked Glenn to let WMS developers know that law libraries need and value a robust serials module. Currently, 45 to 50 institutions are using at least one WMS module.

Connexion

Glenn reminded attendees to upgrade to Connexion client 2.4 by October 1, 2012. Enhancements available in this upgrade include RDA workforms, RDA Toolkit IP authentication, the Classify Web service for suggesting classification numbers, and new macros and macro commands.

RDA Implementation in OCLC

OCLC plans to offer many features to help catalogers implement RDA. Connexion Client 2.4 offers the option to use your IP authentication to directly log into your institution’s subscription to RDA Toolkit to obtain field descriptions. RDA name
authority and bibliographic record workforms are also available in Connexion Client 2.4. Both of these features are found under Tools > Options > RDA. MARC format changes to accommodate RDA were implemented in May 2012, so fields 264 and 336 through 338 can now be used in OCLC bibliographic records. In addition, various RDA-specific MARC fields in bibliographic and authority records are now indexed in WorldCat. For example, very granular searches for publisher location (pl:) and publisher (pb:) are now possible using information coded in the 264 field.

The current “OCLC policy statement on RDA Cataloging in WorldCat for the U.S. testing period and beyond” is still in place, but it will be replaced by a new policy statement, “Incorporating RDA Practices in WorldCat,” later this year. Glenn emphasized that no one will be required to do original cataloging according to RDA. OCLC proposes allowing, although not necessarily encouraging, anyone to change bibliographic records created under previous cataloging codes to RDA beginning after March 31, 2013. All headings, when controlled, will be in the RDA format if the appropriate authority records have been changed to that format. OCLC will allow the addition of the RDA Content/Media/CARRIER type fields (336, 337 and 338) to any bibliographic records. OCLC plans to run programs to spell out abbreviations in non-transcribed fields, such as changing “p.” to “pages” and “ill.” to “illustrations” in the 300 field. OCLC also hopes to change Latin abbreviations to spelled-out English equivalents to accommodate RDA, although no final timetable has been set for this project. For example, “[s.n.]” would become “[publisher not identified]” and “ca.” would become “approximately.” However, OCLC is delaying implementation of one of the most controversial RDA provisions: removal of GMDs from the 245 field when the 336, 337 and 338 fields are added to AACR2 bibliographic records. A free webinar regarding OCLC RDA implementation policy issues will be offered after the new “Incorporating RDA Practices in WorldCat” policy statement is released later this year.

**VIAF (Virtual International Authority File)**

The Virtual International Authority File (VIAF) is now available at [http://viaf.org/](http://viaf.org/). The VIAF links national- and regional-level authority records, thus creating a cluster record for each unique name. This project expands the concept of universal bibliographic control by (1) allowing national and regional variations in authorized form to coexist, and (2) supporting needs for variations in preferred language, script and spelling. Projects like VIAF, which link data in this way, play a role in the emerging semantic web. Currently 22 agencies from 19 countries have contributed data to the VIAF. Glenn demonstrated what VIAF search results look like by performing a search for Richard E. Susskind, AALL’s 2012 Annual Meeting keynote speaker.

**Other OCLC Presentations and Webinars**

Many of the OCLC presentations from the ALA Annual Meeting held in Anaheim in June 2012 were recorded. These are now available on the OCLC website at [http://www.oclc.org/news/events/presentations/default.htm](http://www.oclc.org/news/events/presentations/default.htm).

OCLC also offers a wide variety of webinars on various topics. Many of these webinars are recorded and are made available via the OCLC website at [http://www.oclc.org/news/websessions/recorded.htm](http://www.oclc.org/news/websessions/recorded.htm).

OCLC is scheduling webinars to introduce various aspects of WorldShare Management Services. Upcoming events can be found at [http://www.oclc.org/webscale/events.htm](http://www.oclc.org/webscale/events.htm). Recordings of previous sessions are at [http://www.oclc.org/webscale/overview/websessions.htm](http://www.oclc.org/webscale/overview/websessions.htm). Additional information about WorldShare Management Services is available at [http://www.oclc.org/webscale/default.htm](http://www.oclc.org/webscale/default.htm).

**Updating the OBS OCLC Committee List and Webpage**

By the time you read this column, both the OBS OCLC webpage and the OBS OCLC Committee list on the webpage should be updated. Please review the webpage ([http://www.aallnet.org/sis/obssis/oclc/index.htm](http://www.aallnet.org/sis/obssis/oclc/index.htm)) for content and clarity. If you have any suggestions for links or other information you would find useful, please contact me at karen.selden@colorado.edu. Additionally, if you are interested in being a member of the OBS OCLC Committee, please check to make sure that your name is listed on the webpage. If it is not, or if your listing is not correct, please contact me.

As a reminder, the OBS OCLC Committee is open to any OBS member who has an interest in OCLC and its products or services. There is no formal committee work required of members, but it is useful to create and maintain a community of OBS members who share similar interests and concerns.

As always, please forward any questions or concerns about OCLC and its products and services to me, and I will work with Glenn Patton at OCLC to find answers or obtain clarification.
This year the Joint Research Grant Committee (JRGC) decided to expand its web presence by developing its own AALL Community page and attempting to implement a new online grant application submission form. The Joint Research Grant Community page was created in Fall 2011 and includes a blog to which many JRG committee members contributed. Members from both TS and OBS have joined this community.

Work to create an online grant application submission form began with the committee consulting both the OBS and TS web editors. After that, AALL headquarters was approached to help with the project. AALL Headquarters IT staff declined to assist in the project and placed it in the hands of the OBS web editor. A few mock-ups were presented and refined, but by early 2012, it was clear that full implementation of an online web form would not be possible by the spring 2012 grant deadline. This project will have to be delayed for another year, with possible implementation by spring 2013.

The Joint Research Grant was advertised in local chapter newsletters, on the TS and OBS discussion lists, in TSLL, and multiple times in the AALL president’s e-newsletter. Despite these advertising efforts and the new online presence, there were no applicants for this year’s grant. Promotion and work for the fall 2012 JRG deadline will continue this summer and into the fall.

The committee has developed a survey to help determine why members are not applying for the grant. The survey will be sent to a university-based institutional review board for approval and distributed to TS and OBS members in the coming year.

Joint Research Grant Committee members continue to endorse the value of the OBS/TS SIS Joint Research Grant as well as the research it seeks to support.

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**TS-SIS Acquisitions Committee**

**2012 Committee Meeting and Roundtable Minutes**

The TS-SIS Acquisitions Committee Business Meeting was called to order on Monday, July 23, 2012 by Chair Eric Parker.

I. Introductions

II. Approval of 2011 Minutes

III. Old Business

A. List of law publishers formerly on ACQWEB
   1. Last year, Anne Robbins showed us a mock-up of a blog-styled website meant to track ACQWEB changes and be available for reference
      a. Name, contact information, short description, and tags covering topic & geographic area
         i. Expands and contracts to suit how much information is available and how much work the data entrant is willing to include
         ii. Goal is to have this linked from the TS-SIS website
      b. Is there anyone interested in working on this? Anne would be willing to volunteer with whoever is willing
         i. Ajaye Bloomstone and Lorna Tang volunteered

B. Collection development/cancellations survey
   1. Preliminary results shared with group
      a. Will publish to TS website (webmaster Martin Wisneski)
      b. Article for TSLL, Law Library Journal?
      c. CRIV sheet
   2. What are libraries doing with the “extra” money?
      a. Do libraries have extra money?
      b. Are libraries cutting because they have to?
3. Price Index for Legal Publications editor is present. The index is available to AALL members. 2011 numbers came out just before AALL 2011
   a. Just under 900 titles at present
   b. Feel free to contact the PILP and inform them of titles you feel should be included
   c. Electronic materials are tricky at present
   d. Dan Campbell is the chair of this at present

IV. Report from and Q & A with CRIV representative
   A. Introduction of Cynthia Myers (George Mason Law), CRIV incoming vice president
   B. What has CRIV been doing?
      1. CRIV has a blog at http://crivblog.com
         a. It went live April 2012
            i. Purpose is to provide updates on CRIV and vendor liaison activities
            ii. 84 followers (including international)
            iii. 30+ posts including some on the following:
               • COUNTER compliance
               • Fair business practices
            iv. Administrator – Todd Melnik
         b. Online request for assistance form is live
            i. You can attach documents to it
         c. CRIV sheet, print publication from AALL Spectrum is still up. They’d like to continue this
            i. CRIV sheet publishing is a good way to do a bit of writing and get your feet wet – nothing too long or involved
            ii. Contact Liz Reppe
         d. Sessions at AALL
            i. Noon in 204 – roundtable; topic is ebooks and the legal profession
            ii. G4 – antitrust considerations – 2:45 p.m.-4 p.m., HCC 306
            iii. Coffee talk 7/24 – 7:30 a.m. – electronic content licensing, hosted by vendor liaisons as an informal way to talk about issues – Boyleston Street Hallway, level three of HCC
   C. Plans for the future?
      1. Updating content on the CRIV website
      2. Continue offering assistance to members
      3. Continue CRIV blog and CRIV sheet

V. New Business
   A. Ideas for 2013 programs
      1. Next year’s theme: Rethink Your Value
      2. Deadline for proposals is October 15, 2012, and you can suggest topics even if you don’t actually want to present the program
         a. Any proposals already in the works? What would be of interest?
            i. OneNote as a method for new acquisitions reporting
            ii. Comparison of ways libraries are publicizing their new acquisitions
            iii. How to think like a publisher
            iv. There have been excellent programs on licensing negotiation in the past. Cancellation of negotiation programs would be a good programming topic. Possibly a non-librarian expert in negotiation?
         a. Executive Board has responded, and some changes are being made
            i. Program proposal process will be somewhat different
            ii. Jim Mumm (TS-SIS Education Committee Chair) encourages SIS members to fill out survey (open until 8/10/2012) on what kind of programming we want and feel is important
               • Topics don’t include technical services, which will need to be written in
               • The survey questions will vary depending on which answers on the first panel you select
               • At first there was a glitch with accessing the survey. If you’ve lost the e-mail, you can access the survey via the TS website. You won’t need to log into the AALL website
               • When mentioning programs, do we need to specify a TS slant to the programs we want? Not sure – odds are the topic will appear in a few areas, not necessarily yours if you don’t specify. This year, for example, quite a few SISs had programs on e-books
4. What’s the relationship of the TS Education Committee to this process?
   a. The relationship between all the SISs and AMPC is changing, hopefully for the better
      i. In the past, there were complaints that we don’t have enough time to submit ideas and develop programs
         • Have to plan for next meeting at current meeting
         • Not a lot of communication between some SISs and AMPC
         • AMPC is trying to overcome this sense of disunity?
         • Is this a regression to how things worked seven-ten years ago?
      ii. AMPC wants to work more closely with the SIS committees
         • Program ranking will be different than the past, but you’ll have more direct communication with AMPC representative
         • Is this a big deal? We were only guaranteed the top program, but we actually got 50% of our programs (nine total)
         • AMPC would be doing itself a disservice by focusing programs on one area of libraries. Balance works in everyone’s favor
         • We’ll have to play it out and see what happens
         • If the change bothers you, speak up
         • AMPC’s open meeting at noon – Sheraton Garden B
         • TS meeting is at the same time
         • Problem: AMPC is holding all the cards
         • This will create a bit more work for the education committee liaison to AMPC
         • Justify your existence? We always have to do this, and we have to change with the times
      iii. Each SIS will be given ten meeting slots or be able to have ten meetings at the conference
         • This won’t hit TS as hard as other SISs that have 30-40 meetings at present
         • Restriction is the same, no matter the size of the SIS. This may need to be adjusted
         • AMPC wants more meetings to be conducted during the year
         • Some roundtable/committee meetings might be combined, as the same topics tend to emerge

B. New ACQ Standing Committee Chair for 2012-2014 is Trina Holloway – could not attend today

VI. ACQ Roundtable
   A. State of your library reports
      1. State of law schools across the board. How will this affect libraries?
         a. Vacant positions not being filled
         b. Subscriptions being cancelled
            i. What should be cancelled?
            ii. What is convenient?
            iii. Do we plan to cancel what we need to, or what we MAY need to later?
            iv. Plan for higher percentages of cancellations
            v. Create tiered lists of titles we could cancel but don’t want to yet
            vi. Learn how to negotiate with faculty regarding the collection
            vii. Inform vendors how rate changes affect our ability to collect their materials
            viii. What are the publishers thinking?

Minutes are to be approved at Acquisitions Committee meeting in Seattle.
Preservation Committee Goals for 2012-13

1. Recruit new members
2. Promoting the Committee’s work
   a. Write about it
   i. Put together a piece about the “worst book” photo contest
   ii. Continue producing the Preservation column for TSLL – upcoming topics are the following:
      1. An interview with the chair
      2. A piece on a preservation survey
   b. Put together a “preservation on the cheap” list (because we all have limited preservation budgets) for the TS preservation website and promote elsewhere
   c. Guide for staff awareness of preservation techniques to ensure the longevity of materials (handout, webinar?)
      i. Put together a handout for the website and to distribute at next year’s conference for staff members who know little about preservation techniques. It could also be a guide on training all staff in basic preservation techniques.
      ii. Talk to Legal Information Preservation Alliance (LIPA) and LYRASIS for ideas
      i. Coordinate with LIPA
      ii. Promote “the worst book” contest
      iii. Promote our two new handouts
3. Preservation website
      i. Check for currency/content
      ii. Is there anything that needs to be added to these pages?
         1. Add content for preserving multimedia
   b. New pages:
      i. Preserving through digitization – create a page of digitization resources and proper archival formats for digital documents

TS-SIS Rare Book Cataloging Roundtable Report
Boston, July 23, 2012

The Rare Book Cataloging Roundtable met for its sixth successive year at the Annual Meeting in Boston. Sarah Yates, Roundtable chair and cataloging librarian at the University of Minnesota Law Library led the TS-SIS sponsored meeting, which was attended by a range of catalogers, public services librarians, and rare book dealers.

The first discussion topic this year was deeds of gift: whether various libraries used them when receiving donations and what standard language was used or should be used. We discussed common practices at different libraries and the varying levels of control and ownership retained by donors as opposed to recipients. Important elements included deaccession rights, copyright for personal papers, avoiding the need to consult a donor’s heirs in the future, and specifying a certain date for release of papers as opposed to linking their release to a death date. For those seeking a model to adapt and follow, attendees suggested using the examples on the Federal Judicial History Office website. Librarians at universities were also reminded to contact their university general counsel.

The next topic of interest was how different libraries processed rare books, i.e., whether they made permanent markings or attached labels directly to these volumes. Historical practices at various libraries invariably included such permanent markings (e.g., stamps, bookplates, embossing), but current practice was generally the opposite. Both Yale and Columbia use
barcodes on acid-free slips placed in the items for identification purposes. The group also largely endorsed the continuing
practice of using a soft lead pencil to print call numbers on the title page verso.

The conversation then shifted to the related topic of bookplates and their use in determining provenance. It was agreed
that the identification of a bookplate and/or a former owner justifies an added access point. Catalogers can ask for help in
recognizing unfamiliar bookplates or insignia at http://provenance.cerl.org/cgi-bin/canyouhelp/start.pl, which is run by the
Consortium of European Research Libraries. Letters and loose newspaper clippings found in a book should be retained and
stored separately if they pertain to the owner or to the book itself. The consensus from librarians and book dealers alike was
that provenance is valuable—it makes the individual book unique, and it resonates with scholars.

As happens most years, the group also had the opportunity to share news about new cataloging tools and recent journal
articles of interest. Of special note was Stacy Etheredge’s July AALL Spectrum article about archives in law libraries.

The Rare Book Cataloging Roundtable exists as a community on the AALL website. For more information or to be added
to the community, contact Sarah Yates at yates006@umn.edu.

TS-SIS Serials Standing Committee
2012 Committee Meeting Minutes

Wendy Moore, University of Georgia Law Library
Damon Campbell, Florida Coastal School of Law Library

I. Introductions: Wendy Moore opened the meeting on Tuesday, July 24, 2012 at 7:15 a.m. and led in with introductions of
all participants. There were a total of 18 people in attendance.


III. Old business
   A. Exchange of Duplicates program
      1. Wendy Moore reported that 27 libraries participated in the program this past year. She will try to publicize
         the sign-up for it more this year.
   B. Project Counter Task Group
      1. Lorna Tang, Project Counter Task Group leader, reported that the task group has mainly wrapped up its
         work. She noted that the Bibliography of Project COUNTER Resources was updated as of July 2012 by Pat
         Sayre-McCoy and is available on the Project Counter Task Group page at http://www.aallnet.org/sis/ts sis/
committees/serials/projectcounter/bibliography.htm
      2. Lorna gave a brief update on Project COUNTER status:
         a. A new release was issued earlier this year
         b. Currently statistics for books and databases are combined
         c. Lack of legal information database providers participating makes it not as useful for law libraries
         d. Our vendors seem to want to hear an outcry demanding Project COUNTER from all of their library users,
            versus a single request by the task group. Actions you can take:
            i. Contact vendors - If you are so inclined, there is a link to a sample letter on the task group’s
               webpage that you can adapt: http://www.aallnet.org/sis/ts sis/committees/serials/projectcounter/
countercompliancelettertovendor.pdf
            iii. Contact Margie Maes, AALL Vendor Liaison, to tell her that this is something that you believe needs
to be addressed by our vendors. Email Margie at mmaes@aall.org.

IV. New business
   A. Call for program ideas for AALL 2013
      1. Jim Mumm outlined the changes in the program planning and selection process for the upcoming year. He
         stressed that everyone should be certain to fill out the AMPC survey that runs through August 10. The AMPC
         will use the results of that survey to guide their decision making about programs. The results will be shared
         with members before the call for programs goes out in September. The TS-SIS Education Committee will be
         happy to work with members to improve their program proposals prior to submission, or to help put together
program proposals based on ideas they have. It is up to all of us to come up with programs of interest to TS-SIS, as well as the broader AALL membership. Program submission deadline won’t be until October 15.

2. Some brainstormed program ideas:
   a. Collaborative collection programs (consortia agreement for collecting of serials, e.g., agreement between Duke and the University of Virginia)
   b. Expectation management of faculty regarding serials resources and collection development
   d. Negotiation skills (beyond just license agreements)

B. Survey on Collection Development Trends in Law Libraries report
   1. Damon Campbell briefly mentioned that he and Shyama Agrawal have preliminary results from the Acquisitions Standing Committee’s “Survey on Collection Development Trends in Law Libraries” which they hope to publish in the near future.

V. Serials Roundtable Discussion

   A. The following questions were posed, with some variation, to the group for discussion:
   1. In what ways are you acquiring and providing access to journals online? Such as through third party aggregator databases, full-image archive sites, individual title online subscriptions, or purchasing individual articles when requested, etc.
   2. What print serial-related “passenger pigeons” are you maintaining in your library?
   3. What changes to workflow and staff duties have you made this year, because of decreased print/increased online access to serial-related materials?

   B. In the short time that was left, our discussion focused on print journal cancellations and the criteria libraries were using for determining what to keep in print and what to convert to electronic-only access, or for controlling serials costs more generally. Strategies mentioned were the following:
   1. relying on HeinOnline for journal literature access
   2. cancelling print journals that have no embargo on HeinOnline
   3. cancelling lower-tiered law school journals regardless of electronic access
   4. retaining only print for top 50 journal titles
   5. retaining only print for top ranked subjects of interest
   6. no binding of periodicals
   7. keeping print for current year only
   8. weeding/withdrawal bound periodical sets available in HeinOnline to save space

Meeting was adjourned at 8:17a.m., since discussion exceeded meeting time frame.

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Preservation

Maxine Wright
North Carolina Central University Law Library

Now that the AALL Annual Meeting is over, the changing of the guard is upon us. I would like to formally introduce new incoming Preservation Committee Chair, Lauren P. Seney. What better way to do this than to formally ask her a few questions and present her answers in the TSLL preservation column. I had the pleasure to meet Lauren at the AALL Annual Conference in July, and we chatted up a storm about preservation and the direction of the Preservation Committee. She is the Access/Technical Services Librarian at William & Mary Law Library in Williamsburg, Virginia.

Interview with Preservation Chair, Lauren P. Seney

Describe the path that led you to become the Chair of the Preservation Committee.

I am a fairly new librarian. This is my first professional position, and I have been in it since March of 2010. Many of my responsibilities involve our institutional repository; and for the past year and a half, I have been creating digital copies of numerous institutional documents. While the physical preservation of these documents is outside of my responsibilities, I feel it is my duty to understand what is being done to preserve them and to ensure that everyone working with me is vigilant while handling these documents. This is important because creating digital copies should not destroy the originals. I got involved with this committee, as well as the one in my state chapter, as a way of expanding my knowledge. The enthusiasm
Sally Wambold shows for preservation is contagious, and working with her on both of these committees has shown me how much there is for me to learn. I am honored to chair this committee and hope to expand the resources we provide in the coming year.

**What are you most excited about as you step into your new role?**
I look forward to working with the committee to develop additional preservation resources. In the past year, the Preservation Committee was able to add an additional page to the website at [http://www.aallnet.org/sis/issis/techlinks/preservation/guidelinesandtips.htm](http://www.aallnet.org/sis/issis/techlinks/preservation/guidelinesandtips.htm). In the coming year, we will work to develop resources for the preservation of non-paper materials. I am also excited about the enthusiasm the committee has shown in the past month. We come from many nooks in the technical services realm, and are involved in different types of preservation. This prepares us to take on the challenge of developing resources for preserving more non-traditional resources.

**How do you plan to increase awareness about this committee and preservation as a whole?**
In Boston, we generated a lot of positive feedback from the “worst book” contest you coordinated. So in the coming year, I hope to provide some additional preservation resources for everyone and to promote them in conjunction with the Second Annual “Worst Book” contest. We are also looking at ways to promote Preservation Week and provide resources for training staff about preservation.

**What resources do you frequently use to help navigate the world of preservation?**
In the past 18 months, many of the resources I use for preservation have been about the stewardship of digital documents. I find that the repository discussion list I am on is a gold mine for answering many questions. I have also used the Library of Congress’ preservation resources at [http://www.loc.gov/preservation/](http://www.loc.gov/preservation/) many times.

**Are there any questions you would like to pose to TSLL readers?**
Yes. I would like to take the opportunity to ask the members what types of preservation resources they need. The goals of the committee are laid out in our minutes in this issue of *TSLL*, and I would like to know if we are overlooking an aspect of preservation that needs to be explored. Thank you.

**Preservation Activities: AALL Annual Meeting 2012**
It is fair to say Preservation Committee members had a blast at the TS-SIS Activities Table. Throughout the conference Michelle Gorespe, acquisitions librarian at UCLA; Lauren P. Seney, Preservation Chair; and Maxine Wright staffed the table. In short, 17 members officially tried our Preservation Scrambler, and we had 22 members stop by to guess a few words just for fun. Unfortunately, no one walked away with the top prize ($25.00 Amazon Gift Card). Two members, however, walked away with $5.00 gift cards to Subway (yummy), and 39 received handy dandy TS Preservation caps. We had one other freebie, book spine samplers. These were first-come, first-serve. They went so quickly – I wish we had more to give. The “Groom/Stick” was a big hit. Surprisingly, quite a number of members never heard of the product and were eager to see, smell, and touch it. Please see the TS Preservation webpage for details and info on this product.

Last, our “worst book” contest was a success. Many members stopped by the table to take a peek at the entries and to see the winning photo (submitted by Oklahoma City University). The winner received a $150.00 Visa gift card. How will Oklahoma City University spend their wad of cash? Will they repair a book, pay for a webinar on preservation, have a brown bag lunch on preservation – what will they do? Stay tuned: Jennifer Prilliman, head of reference services has agreed to share their decision with all of us as soon as they decide. In the meantime, please start thinking about what photo you will submit next year for AALL 2013, Seattle. The Preservation Committee has decided to make the “worst book” contest an annual event.

**Annual AMPC Survey: Will Preservation Make the List?**
I am excited to see the results of AMPC survey. Are other members interested in preservation enough to mention it on the survey? Stay tuned…..

I’ll sign off this time by sharing a few pictures from the “worst book” contest.
Contest entries

*Oklahoma City University Law Library — Winner of the TS-SIS Preservation Worst Book Ever Contest*
The social networking at the 2012 Conference of Newer Law Librarians at the AALL Annual Meeting in Boston will likely keep the business card industry in the black for at least another year. This daylong event is a unique opportunity for nascent law librarians to connect with colleagues in a similar career stage. For me, the Annual Meeting fell at the end of a challenging year of graduate studies in law librarianship, and I attended the conference with the ulterior motive of advancing toward joining the ranks of the employed. CONELL enabled me to interact with other professionals convening to partake in the spirit of communal enthusiasm for law librarianship and compare notes from the field. I thank the TS-SIS for the privilege of receiving the Marla Schwartz Grant to attend this convivial gathering.

The day started early with a continental breakfast at small roundtables. While stirring myself to full networking capabilities with fresh fruit, wholesome cereal, and piping hot coffee, I introduced myself to colleagues and learned about their interests in the profession. Unbeknownst to me, I was lucky enough to have the esteemed AALL President-Elect, Jean Wenger, at the table, bemusedly observing our interactions and peppering the conversation with interested questions. After breakfast, we shuffled into the main room, listened to President Darcy Kirk, and then split into small groups for a “Breakout” session with the members of the AALL Executive Board. It was pleasant to have someone in the know answer questions about the upcoming conference. A common remark was that the conference schedule seemed overwhelming. With the benefit of hindsight, this observation was prescient—it is simply impossible to attend every fascinating, stimulating session!

Following the “Breakout” session, a number of seasoned professionals welcomed us to the conference and urged us to make the most of our experiences and careers. Their words carried to our eager ears the central message of CONELL: opportunities abound in AALL, but you must actively pursue them. Up next, the whole group split into two sections. My half moved on to a “Speed Networking” session, wherein we had a few minutes to get to know the person seated directly opposite us in a long line of keen law librarians. This amount of time is hardly long enough to tell your life story, but it is possible to learn quite a few interesting facts about your colleagues. Because I often focus on working in an academic law library, I was pleased to hear about the diverse experiences of my interlocutors, many of whom work in court or firm libraries. One thing I noticed is that careers in this profession often start in unexpected ways—it’s difficult to predict where one will end up, but the results are always interesting!

My group then switched with the other half and took a more leisurely stroll around the “CONELL Marketplace.” I talked to many enthusiastic section members and received sensible advice about the conference and how to become more involved in the association. After a lunch break, the entire assemblage reconvened for a “Mocktail Dessert Reception,” an icebreaker that spurred some heated discussion in the subsequent, concluding review session. The premise of the session was that we each had a persona with a profile full of richly imagined details. I happened to be an avid skeet shooter as well as a sports medicine doctor with famous clients, and my wife taught children how to sail—it was all very silly but effective in its intended purpose to initiate conversations and improve networking skills. I noticed most conversations moved quickly toward real-world talk, and the consensus was that this fun experience might have been more effective at the beginning of CONELL rather than at the end.

The rest of my conference experience was filled with the interesting programming that law librarians are especially adept at designing and implementing, evening receptions in which I met more experienced veterans of the profession, and of course, numerous interviews that I hope will be as productive in starting my career as my first day of networking and learning in Boston. A tremendous thank-you to TS-SIS for making possible my attendance at CONELL!
Prior to arriving at the workshop, attendees received several emails to prepare them for the day ahead. The first email directed us to obtain a 30-day trial subscription to the RDA Toolkit if we didn’t already have a subscription. We would be using the RDA Toolkit throughout the day of the workshop, and it was imperative that we had a subscription. Another email soon followed with links to sources to review for homework. We were encouraged to review the information in at least one of the three links. The first link was to the RDA Toolkit itself at http://access.rdatoolkit.org, where we were asked to read the text of RDA 0.0 (Introduction) through 3.5. The second link was to two PowerPoint presentations (FRBR Fundamental Concepts and FBR, RDA, and MARC) from the Library of Congress RDA training materials at http://www.loc.gov/catworkshop/RDA%20training%20materials/LC%20RDA%20Training/LC%20RDA%20course%20table.html. The final link was to a Catalogers Learning Workshop webcast on RDA/FRBR at http://www.loc.gov/catworkshop/RDA%20training%20materials/index.html. We received one more email which contained the agenda for the workshop.

Melissa Beck (UCLA Law School) opened the workshop by welcoming us and assuring us that when we left, we would be armed with more knowledge, materials, and resources on RDA than we had upon arrival. We would be on the path to using RDA, but would still need further training. Following Melissa’s welcome, presenters were introduced and the day’s agenda was reviewed.

The first presentation was given by Paul Frank (Library of Congress) and George Prager (New York University). Paul and George bid attendees to learn to think and talk in RDA. Their presentation focused on the FRBR user tasks: find, identify, select, and obtain, and included a skit which really brought to life how each of these tasks responds to user needs and requests. Next, they reviewed each entity contained within each FRBR group. While I truly enjoyed the skit at the beginning of this presentation, the remainder was extremely similar to the PowerPoint presentation I reviewed prior to the workshop.

One of the highlights of the workshop was the hands-on portion. Laptops were provided for every two attendees so we could access the RDA Toolkit. Lia Contursi (Columbia University) presented an introduction to the RDA Toolkit. Lia reviewed how to access the Toolkit, the Toolkit tabs, how to find the content standard in RDA and MARC, and tips for searching. Lia suggested checking the Library of Congress Policy Statements (LCPS’s) because their instructions are good and include clear examples. Attendees followed along with Lia and explored the Toolkit during her presentation. There was also an activity portion during which attendees searched the Toolkit to locate RDA instructions on a specific topic. During this portion of the presentation Lia noted that we are forcing RDA into the MARC21 format. Once we can stop doing this, RDA will make more sense.

George Prager once again took the stage to review cataloging law treatises and other monographs. This portion of the workshop began with George reviewing some RDA guidelines. Attendees were then directed to look at the title pages and bib records of some examples contained in our handouts. Next, attendees were encouraged to use the cataloging worksheet provided to catalog one of the examples following RDA guidelines. We were allowed to use the RDA Toolkit during this portion of the presentation. After we completed the first example and reviewed the answers, it became apparent we would not have time to continue with this exercise. We ended up reviewing the remaining examples together. This was a bit of a disappointment, since I was hoping to receive more “hands-on training.”

The next presenter was John Hostage (Harvard Law School Library), who reviewed cataloging specific types of legal works such as laws, regulations, constitutions, treaties, and court reports. This presentation consisted of PowerPoint slides showing the location of the guidelines for each of the materials in the RDA Toolkit. For example, guidelines for the preferred title for a legal work can be found in section 6.19.2.5.2.

Melissa Beck presented on cataloging serials and integrating resources using RDA. Melissa, like John, provided the section numbers in the RDA Toolkit that contained the guidelines for cataloging serials and integrating resources. Melissa also reviewed the steps she took to learn RDA, one of which was taking the time to read the entire RDA Toolkit.

The next section of the workshop was on training approaches and online resources, presented by Patricia Sayre-McCoy (University of Chicago). Pat quickly provided us with some excellent websites to obtain information on training for ourselves and staff members. One that I will use is the RDA in NACO training available at http://www.loc.gov/catworkshop/courses/rda_naco/. Pat also suggested that we attend her program, “C-2: Launching into RDA: The New Frontier” for more information.
The final presenter was one of our first presenters, Paul Frank, who provided tips for using RDA and discussed what the future holds.

In the end, this workshop was not what I expected. I thought there would be more hands-on activities, but time didn’t permit this type of instruction. I learned some new things and received excellent tips, but much of the same information is available on websites like the Library of Congress RDA-related pages, and through RDA webinars. The workshop did reinforce what I’ve been learning, and I confirmed that I’m on the right track with my understanding of RDA. I was hoping there would be a discussion about what direction the cataloging community would be moving relative to the disconnect between RDA and MARC, but there was none. However, there was a lively discussion about the need for “best practices” decisions for applying RDA guidelines to legal materials. While the workshop was helpful, it’s clear to me that I need to follow the advice of Paul Frank and “jump in and start using RDA.”

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**Program Report**

**AALL Keynote Address by Richard Susskind**

Reported by Jennifer Noga

Wake Forest University

Keynote speaker Richard Susskind, author, speaker, and consultant presented “Tomorrow’s Legal Marketplace” during the Opening General Session at this year’s Annual Meeting in Boston. He focused on how change, especially as it relates to technology and the economy, will transform business as usual in the legal profession. He argued that the challenges brought about by change will require lawyers to focus on fundamental values and think of creative ways to give customers what they want. Lawyers, he pointed out, are in the knowledge business, and law librarians are ideally positioned to help meet many of the foreseeable challenges because knowledge and information are at the heart of what we do.

He identified three drivers of change in the legal marketplace. First, technology is a major change agent. For example, Susskind noted that lawyers need to rethink the way they provide services in light of exponential growth in computer processing power. Second, the legal profession is challenged by doing more with less, necessitating increased collaboration and strategies that maximize efficiency and standardize repetitive processes in legal support services. These strategies include decomposing, the process of breaking work down into separate tasks to determine the most efficient way of sourcing the work. Susskind’s example was listing tasks involved in litigation and identifying non-lawyers who can conduct document review or project management. Multisourcing, another strategy for doing more with less, also looks at the most efficient way to source elements of tasks. The third change agent Susskind mentioned is liberalization, the concept of incorporating other disciplines into the delivery of legal services. According to Susskind, this practice is fairly common in Europe and will inevitably increase in the U.S.

Interestingly, this reporter notes libraries already have been dealing with similar change agents. For more than ten years, libraries—and specifically technical services departments—have used technology to automate repetitive tasks, partnered through consortiums to achieve cost-cutting and collaboration, and outsourced portions of our work to other entities. Our experiences will be valuable as the legal marketplace grapples with these challenges.

Susskind argued that the current customized fee-by-hour service, which is how most firms do business, is not sustainable in today’s marketplace where legal services can be sourced in a variety of ways. He predicts an ongoing push to find quick, cheap, and efficient alternatives to undertake the work of lawyers, particularly legal support services. This push will change the way lawyers do business, in effect “commoditizing” many legal services.

The changes, however, will also open up new possibilities for jobs in the legal marketplace. Legal education and law libraries must prepare law students with new, flexible skills for those jobs. Susskind noted many of the new opportunities will be focused on information service. For instance, he predicts new jobs like legal knowledge engineer, legal technologist, and legal process analyst will become more prevalent. Law librarians are well positioned to do these new jobs because the work involved matches our skill set. In the end, Susskind noted, the legal sector is moving toward librarians’ skills and experience.

Program Report

The Accidental Archivists: Lessons Learned from a Digital Archive Project

Reported by Christine Korytnyk Dulaney
American University Pence Law Library

Moderator and Speaker: Karen Selden, University of Colorado Law School, William A. Wise Law Library
Speakers: Georgia Briscoe, University of Colorado Law School, William A. Wise Law Library; Robert M. Linz, University of Colorado Law School, William A. Wise Law Library

With the unexpected death of former law school dean David Harding Getches, a much-beloved leader in the law school community and prolific scholar, the law library staff at the University of Colorado School of Law found themselves in a new role of “accidental archivists.” Dean Getches’ family donated his voluminous collection of scholarly papers and writings, treatises, and other materials to the library. These materials marked the library staff’s first digital project. It represented an opportunity to honor the memory of the late dean and to develop a long-term work plan for future digitization projects. In this program, the library staff provided a case study describing how they developed a project plan, determined the technological solutions, established metadata standards, and created a public website. This work was completed within a tight deadline and successfully presented the accomplishments of the former dean, honoring his memory for his family, the law school, and the legal community.

The presentation divided this project into the following three sections: (1) preliminary collections work, (2) technology and scanning; and (3) metadata. During the first steps, the library staff created a project workflow for the materials, implemented a project work slip so that materials were handled efficiently, and completed all preliminary paperwork involving copyright permissions, donor agreements, and detailed records of all donated materials. To highlight this donation for library users, the staff created a virtual bookplate which displays in the library catalog alongside the bibliographic entry for each donated title. A matching paper bookplate was created and affixed to each donated book following archival standards.

Before digitization began, the staff evaluated the quality of the donated print materials and determined the scope of the collection, the time commitment required, and the type of equipment required. Once the staff decided to digitize in-house, they evaluated scanning equipment based on several factors, including size and fragility of print, cost, functionality, quality of scanned image, efficiency of editing process, storage capabilities, and data backup. The library purchased ExLibris Digitool for its repository and decided on the design of the repository website.

After the collection was organized and scanned, the cataloging staff added metadata to enhance access and discovery. MARC bibliographic records were created in the library’s Integrated Library System (ILS) using templates with project-specific MARC fields to ensure consistency and accuracy in creating these bibliographic records, as well as to ensure accurate linking to the repository record and virtual bookplate. MARC Edit was used to convert the records into MARC-XML for import into the repository. Copyright permission tasks were tracked using a spreadsheet. Staff created a website with tabs to organize the papers into the following categories: publications, speeches, media and awards. Page-turning software creates a visually stunning presentation for website users.

In the course of project completion, the library staff learned the importance of exploring local sources for expertise and advice, working together as a team, not underestimating what the team could accomplish, maintaining a steady pace, setting realistic goals, and how to showcase their skills through marketing.

It was a pleasure to hear how this library staff overcame the challenges of tackling a new area of librarianship. Their ability to develop new skills and successfully complete this project enhanced the library’s collection and promoted further scholarship. But even more important, it demonstrated the power of collaboration, which elevated this project to a true labor of love in honor of their late dean.
Program Report

Class KIA-KIX: A Revolutionary New Classification Schedule for the 21st Century

Reported by Cate Kellett
Yale Law School

Moderator: Ajaye Bloomstone, Louisiana State University
Presenters: Jolande E. Goldberg, Library of Congress; George Prager, New York University

Dr. Jolande E. Goldberg and George Prager presented on the new Library of Congress Classification schedule KIA-KIX for the Law of Indigenous Peoples in the Americas. According to Dr. Goldberg, the schedule provides “for the first time a geographical and substantive arrangement for Indigenous Peoples in the Americas, their organization, and the unique and complex body of legal sources concerning these Peoples.” For tribes located within the geographical boundaries of the United States, all legal materials that were classed in the K schedule were previously located in KF8220+. This range included both federal laws and the laws of the tribes themselves. The laws of the more than 500 tribes were all located in a single class number, KF8228. The new schedule allows for a more granular arrangement, with each tribe occupying a range of class numbers, depending on the group’s size.

Dr. Goldberg explained that implementing a new classification schedule takes many years of research and planning. Tribal legal materials are particularly difficult to find because there are hundreds of tribes, and only a few publish their laws online. So much time and effort was put into finding those materials that Dr. Goldberg decided to make them publicly available in one centralized location. Links to online sources will be placed in the same order as the class schedule and accessible through the Library of Congress. The final location has not been set, but news and updates on the KIA-KIX schedule can be found at LC’s Cataloging and Acquisitions homepage at http://www.loc.gov/aba/.

Mr. Prager described the weeks he spent working at the Library of Congress to reclassify materials into the new schedule. Before starting this test phase, he had to locate tribal legal materials. In addition to KF8220+, materials were located in other LC classification numbers, particularly E75-E99 (History of the Americas) and KF5660-KF5662 (Indian Lands). Additional resources were found in Thomas Jefferson’s legacy classification scheme, and some titles were never classified at all. Mr. Prager and his team reclassified approximately 1,196 titles, most of which were tribal codes, court reporters, session laws, corporate charters, constitutions, and bylaws. The previous call number is still available in the MARC 991 field and searchable through LC’s call number index. Further work is necessary to reclassify missed materials, including 50 rare books in KF8228 and the Indigenous law of Canada. Mr. Prager also noted that new subject headings are needed to complement the schedule, such as “Peacemaker courts” and “Blood quantum.”

After the conference, Mr. Prager announced the availability of a webpage for people to submit questions about the KIA-KIX class schedule. The form can be found at http://www.aallnet.org/sis/tssis/classificationquestions/kia-kix/questions/.

Program Report

Creating Legal Subject Headings

Reported by Abigail Bibee
University of Michigan Law Library

Presenters: Paul Frank, Library of Congress; George Prager, New York University Law Library; Suzanne R. Graham, University of Georgia, Alexander Campbell King Law Library

Paul Frank began by summarizing the Subject Authority Cooperative Program (SACO) process. A cataloger recognizes the need for a new subject heading and develops a proposal. The proposal is prepared and submitted in Classification Web. After it is initially reviewed by Frank, it is sent on to the Policy & Standards Division at the Library of Congress, where at editorial meetings, the committee approves or rejects proposed subject terms. These decisions are published in editorial summaries. Rejected headings are listed as either “not approved” or with a note that the term may be re-submitted with an edited proposal. Any SACO member or SACO funnel can propose terms. Training materials are available at the PCC website at http://www.loc.gov/aba/pcc/saco/.

George Prager then demonstrated the steps involved in developing a subject heading proposal, using a proposal he was currently working on. The most important first step in the process is to determine whether a subject is adequately covered
by existing subject headings. If not, research is needed to determine if it is a legitimate concept and to provide evidence that it is or is not cited in the literature, including dictionaries, encyclopedias, thesauri and even *Wikipedia*. Paul Frank cautioned the audience that sources other than *Wikipedia* are preferred, but if used it should be an article that has plenty of bibliographical references. Citing just one source outside of the work you found the term in is generally sufficient, such as *Black’s law dictionary* or another legal dictionary. When creating the proposal, you also can cite pattern headings, scope notes, add an 053 field for the classification number or separately propose a classification number.

While this process seems like a lot of work for proposing a single subject heading, the presenters reminded the audience that no one is going to curate the legal subject heading terms for us. In order to get more catalogers to propose terms, TS-SIS has tried to make the process easier by creating the SACO Law Funnel. They hope it will promote law-related term generation by bringing together proposers and SACO-trained catalogers to assist in the proposal process. TS-SIS members can fill out an abbreviated version of the proposal form and submit it to the funnel for comment and review by the funnel coordinators. The Cataloging and Classification Committee discusses and refines the proposal and then the coordinator submits the proposal or sends it back to the proposer to submit.

The presenters encouraged the audience to take an active role in developing our vocabulary and reminded us that there are plenty of legal terms out there waiting to be proposed. This program was excellent because it provided practical tools and support for successfully navigating the subject heading proposal process.

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**Program Report**

**E Stats Collection for Your Non-Stacks Collections**

Reported by Carol Morgan Collins  
University of Tennessee College of Law

Organizer: Ian Kipnes, California Western School of Law Library  
Presenters: Sujay Darji, Product Manager, Swets (North and South America), ScholarlyStats; Ian Connor, Senior Director of Engineering, Pubget; Peter Charkalis, Director of Sales, Information Technology Supply, Ltd. (North American Operations), Onelog

Three competing vendors summarized COUNTER-compliant systems that provide information professionals with a means to compare and evaluate online packages. Using raw data harvested from vendors’ products, these online tools systematically generate customizable holdings, usage, and costs reports. These reports empower librarians to make informed, cost-effective collection decisions for their institutions.

- Sujay Darji, Product Manager for Swets, described the difficulty in gathering statistics from several sources in various formats and then interpreting the raw data. Swets offers ScholarlyStats, which supplies a comprehensive view of an entire collection in one location. Comparisons can be made between/among packages as well as individual titles. Reports demonstrate how a journal or resource is being used, where it is being used, and cost per use.

- Ian Connor, Senior Engineer for Pubget, Inc., reiterated the difficulty in downloading and analyzing raw data on a vendor-by-vendor basis. He gave an overview of PaperStats, originally developed to assist medical librarians in determining vendor package coverage. This system generates cost and usage reports. With these detailed reports, librarians are equipped to make budget-conscious collection decisions.

- Peter Charkalis, Director of Sales for Information Technology Supply, Ltd., presented the audience with information about Onelog. This system generates reports designed to help manage, connect, and recover costs associated with web resource usage. Primarily designed to serve the legal market, the system’s reports are customizable based on unique needs.

After the presentations, questions were taken from the floor. Cost was the overarching concern. Speaking for Pubget, Ian Connor replied that PaperStats is affordable. Sujay Darji reported that the number of resources being monitored by ScholarlyStats determines the cost. Peter Charkalis explained that the cost of Onelog is based on the number of users and not the number of resources being monitored.

At the conclusion of the session, participants with further questions were invited to speak with the vendors.
Guerrilla Usability Testing

Speakers: Jason Eiseman, Head of Technology Services at Yale Law School, Lillian Goldman Library; Roger Skalbeck, Associate Law Librarian for Electronic Resources & Services, Georgetown Law Library

Law libraries in most institutions have websites to inform and promote their resources and services for their users. The users’ success in finding what they are looking for on a website is highly dependent upon the ease of navigation. Web designers can benefit from observing a user’s navigation of the website, and subsequently using their observations to improve the website. Usability testing doesn’t have to be tied to a redesign; it can also be used to drive tweaking a website.

During usability testing, the web designer or usability tester identifies essential web navigation tasks and conducts a session in which the user is asked to perform these tasks while being observed. Participants are asked to think out loud as they are navigating because the testers want to know what they are thinking. The purpose is to observe how people function in a realistic manner so developers can identify problem areas as well as determine what people like.

The speakers showed sample video clips of a usability test conducted by students searching the university law library website to find a printer. After watching several participants navigate, it became obvious that finding a printer on the university website was not easy.

Eiseman and Skalbeck conducted a live demonstration of usability testing using an inexpensive video software program. A volunteer from the audience was asked to vocalize thoughts during the testing. The volunteer was asked to sign a document indicating consent to be captured on video. The recently redesigned AALLnet website was evaluated for this usability test. One result from this test was that the “search” box on AALLnet was overlooked and may not be sufficiently prominent.

The speakers suggest beginning the usability test process by making a plan, inviting participants, and starting the testing process. The following are the key components of a usability testing plan:

1. Work from a script of user defined tasks of known items. Ask them to locate each.
2. Define the scope. Focus on a set of tasks with a specific, limited scope. Determine a time limit.
3. Test websites and not users. It is the site you are testing, not the user. Users may not know what they need. Usability tests may be able to help them find what they need.
4. Do not try to prove something. We often make assumptions when we think the user is doing a particular act. Don’t try to prove it. Do this for discovery.
5. Test early, and test often. Testing fewer people more often is better.
6. Review, analyze, and share results. Take the video to meetings for discussion.

One tip the speakers suggested is to offer incentives to your users to encourage participation. This can be in the form of inexpensive items such as: iTunes, copy cards, Amazon cards, Cliff Bars, water bottles, etc.

Finally, usability testing alone isn’t enough to evaluate your website. They recommended additional tools for user feedback such as the use of Google Analytics to determine landing pages. Also, survey data can be used to analyze the problems people have with navigation.

The software used during the program was Silverback, which costs $70 for use on a MacIntosh computer. This program cannot be used on a computer running Windows. For a high-end testing program, Techsmith has a product that costs $1500-$1800. It will measure such things as time to complete a task. Of course, a low-tech and inexpensive method of observation can be as simple as watching and taking notes. A handout is available on the AALL website, which includes a program abstract and a brief annotated bibliography of usability sources. This can be found at http://www.cmcgc.com/Media/handouts/320723/A3_Skalbeck_A.pdf.

Listed below are references on usability testing that Eisman and Skalebeck recommend.


Presented by Maxine Wright (North Carolina Central University) and Valerie Wright (Licensed Master Social Worker, Harlem Hospital Center), “Helping Others Learn, Connect, and Grow Through Times of Stress” provided attendees valuable information on dealing with sensitive staff issues in a well-organized, occasionally entertaining manner that left me thinking about the issues long after leaving the program. Following opening remarks, both speakers demonstrated specific techniques for responding to staff issues in the following situations: (1) Child custody; (2) Depression; (3) Aging parents; (4) Homelessness; and (5) Chronic illness. Then, there was time reserved for audience questions and closing remarks by both speakers.

In her opening remarks, Maxine Wright discussed the provenance of her idea for the program. She explained that she managed a relatively large staff and collection at Columbia University for 15 years and spent a significant amount of time talking with staff dealing with life-altering, major issues. She observed that these types of issues increased in recent years, and she found herself wanting “to connect in a meaningful way” rather than, for example, reciting policies or taking disciplinary action for repeated absences or excessive lateness.

Valerie Wright also made opening remarks, during which she explained that helping is a skill that can be learned. She compared librarians to social workers, in that both professionals are experts at helping people find necessary resources quickly. She pointed out that staff who are going through serious life events are experiencing “pure stress”—tension, anxiety, and pressure. In those situations, the first and often most important thing managers or other co-workers can do is acknowledge the difficult emotional time the staff member is facing.

First, child custody situations are very common among staff in all workplaces. The speakers stressed the importance of understanding that divorce and child custody disputes are a “situational crisis” involving a loss of identity, family, dreams, and commitment. It is essential to listen actively while the employee talks about what is going on. Active listening includes paraphrasing and restating what the person says while expressing empathy, and encouraging further expression of thought. Managers or other staff responsible for dealing with staff issues should engage the employee in exploring ways to improve the workplace situation. While managers can make some suggestions, it is far more empowering for the employee to make his/her own decisions.

Second, depression is another common issue employees face, and it affects people across all economic levels and backgrounds. Employees may be hesitant to discuss depression with their managers due to a fear of the stigma that unfortunately still surrounds emotional or mental issues. When initiating a discussion about the situation, the speakers recommended first assuring the employee his/her job is not in jeopardy unless of course the employee refuses to seek treatment. This will help reduce the employee’s anxiety and lead to better communication throughout the conversation. It is also very important to say something positive and sincere about the person’s value as an employee and suggest contacting a therapist because he/she deserves to feel better. Further, the manager should always follow up with the employee in subsequent weeks and months.

Third, many employees have taken on the responsibility of caring for aging parents. This role reversal can be taxing on even the most balanced, easy-going employees. The speakers suggested that the manager should acknowledge the difficulty of balancing these increased demands and that discussion of the topic is not intended to increase the employee’s stress. If an employee is having trouble at work due to caring for parents, the manager should understand this can lead to overwhelming feelings. The manager should ask or inform the employee about support services for the elderly and perhaps suggest the employee seek therapy to help deal with the emotional and physical toll the changing situation is taking on him/her.

Fourth, the speakers noted that the “faces of the homeless” have changed in recent years. Increasing numbers of people are “working but without a home.” A manager talking with an employee experiencing such a devastating loss must acknowledge...
the severity and the embarrassing nature of the situation. The speakers suggested acknowledging some of the character strengths that will help the employee deal with the situation. Some employees faced with nowhere to go may ask or even beg to sleep in the library for a short period of time; managers must maintain strong boundaries, and be prepared to cite policies prohibiting that under any circumstances. The speakers suggested helping the employee connect with community resources, friends, or family to meet the goal of finding housing. They argued that breaking rules and allowing the employee to stay in the library would reinforce the victim mentality, while a focus on the goal of finding housing would be more effective at restoring some feelings of control in the employee.

Fifth, dealing with the chronic illness of a child is another situation many employees face that leads to despair and helplessness, which in turn cause difficulties at work. The psycho-social effects on parents caring for a chronically ill child can lead to severe overwhelming feelings. As in all situations, it is important for managers to express sincere empathy. Managers should focus the conversation on exploring options for assistance, whether it is financial, educational, medical, or finding appropriate child care.

The program summary gave ten final tips for dealing with sensitive employee situations. (1) Be prepared and knowledgeable; (2) Reduce employee anxiety; (3) Communicate empathy; (4) Engage the employee in the decision-making process; (5) Establish boundaries and avoid over-involvement; (6) Explore the options; (7) Provide positive reinforcement; (8) Acknowledge feelings; (9) Get commitment from the employee to take steps to resolve the situation; and (10) Always be fair and transparent with the employee.

At the end of the program, Maxine Wright urged everyone to keep in mind that employees remember and reflect upon how they were treated in the workplace while going through difficult times. This alone is reason enough to make the effort to engage with employees facing extremely difficult situations with as much empathy, compassion, and tact as possible. This program certainly met its goal in teaching managers how to help staff members learn, connect, and grow through times of stress.

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Program Report

**The Innovative Interfaces/SkyRiver v. OCLC Lawsuit: Who Wins? Who Loses?**

Reported by Karen Selden  
University of Colorado  
William A. Wise Law Library

Presented by: Richard M. Jost, Scott Matheson, Jonathan A. Franklin, and Marshall Breeding

Official program description from the conference program book: “The SkyRiver/Innovative Interfaces lawsuit against OCLC for monopoly practices has potentially wide-ranging impact for the law library world. These two major automation players, whose business interests were formerly in separate worlds, are now in direct competition. While OCLC has long been the primary bibliographic utility for copy cataloging, SkyRiver has recently become a new vendor supplying bibliographic records to libraries. And while Innovative Interfaces has long been the provider of integrated library systems (especially for law libraries), the development of WorldCat Local and Web Management Services by OCLC makes it a significant player in this market, too. This program will present the facts surrounding this lawsuit, what it may mean for libraries, and some projections for the future of library automation.”

Despite a description that promised to deliver an overview of this case and its implications for libraries and library automation, I admit that I had a certain voyeuristic interest when I decided to attend this OBS-sponsored program. I thought (hoped?) that perhaps the audience would hear some sensational details about the case; who doesn’t love a little controversy and “dirt,” especially when it involves two of our most ubiquitous law library vendors? However, the four presenters delivered exactly what they promised: a very factual, thorough, and nicely presented overview of the case, followed by two very thoughtful and engaging discussions of its implications for libraries and library automation.

Richard Jost, Information Systems Coordinator at the University of Washington Gallagher Law Library, set the stage by reminding the audience how Innovative Interfaces/SkyRiver and OCLC are migrating into direct competition with each other in the bibliographic utility and integrated library systems (ILS) markets.

Richard was followed by Scott Matheson, the Librarian for Digital Resources at the Yale Law School Lillian Goldman Library. Scott served as the “data wrangler” to present the facts of the case. Scott described his presentation as similar to a law school case review, but without knowing the end result. In a nutshell, III and SkyRiver have banded together to accuse OCLC of monopolizing three library services markets (bibliographic data, cataloging and bibliographic services, and
resource sharing (ILL services) and attempting to monopolize a fourth (ILS software). Scott presented a very attractive and interactive historical timeline on the screen to help the audience follow the case as it has developed.

SkyRiver was founded in 2009 by Jerry Kline, one of the founders of Innovative Interfaces, Inc. (III). SkyRiver acknowledges that it is in competition with OCLC, but SkyRiver supports open sharing of bibliographic records and offers lower prices. Michigan State University (MSU) became one of SkyRiver’s first customers, but was forced to drop its OCLC resource sharing services in February 2010 because those OCLC services became prohibitively expensive when OCLC was asked to unbundle them from OCLC’s traditional bibliographic and resource sharing services pricing model. This development prompted SkyRiver to launch its original case against OCLC in July 2010, accusing OCLC of monopolizing the three previously mentioned markets: (1) bibliographic data, (2) cataloging and bibliographic services, and (3) resource sharing (ILL) services. In December 2010, OCLC moved to dismiss the complaint. The motion was denied, and the discovery process began in April 2011.

In March 2012, III joined SkyRiver’s original complaint, adding that OCLC is attempting to monopolize the ILS software industry as well. Through the complaint, SkyRiver is seeking treble damages from OCLC and access to WorldCat data, although—interestingly—SkyRiver is not necessarily asking that this access be free. Scott pointed out that there is “a lot of meat [issues] to the complaint.” For example, is a bibliographic record subject to copyright? Is the OCLC database subject to copyright? How will the Sherman Antitrust Act be applied to this case? And, interestingly, the case only concerns itself with the United States academic library market.

Next, Jonathan Franklin, Associate Law Librarian at the University of Washington Gallagher Law Library, delivered a thoughtful and philosophical commentary on how information discovery behavior is changing and how these changes impact library discovery platforms. Jonathan’s presentation was accompanied by very entertaining and fun slides—definitely a good way to keep an audience at an 8:30 a.m. presentation awake and engaged. Interestingly, I noted how entertaining Jonathan’s slides were, but I notice that my notes on his presentation are disappointing vague on details. Apparently, I was enjoying his slides and presentation so much that I missed fleshing out my notes. I apologize in advance for not providing many details to support Jonathan’s general points.

Jonathan started by reminding the audience of Ranganathan’s five laws of library science: (1) Books are for use, (2) Every reader his [or her] book, (3) Every book its reader, (4) Save the time of the reader, and (5) The library is a growing organism. He discussed the concept of “satisficing,” a combination of the words “satisfy” and “suffice.” Many of today’s information seekers are willing to be “satisfied” with information that is “good enough” or sufficient, rather than perfect. Jonathan also discussed the Cathedral model of information discovery vs. the Bazaar model of information discovery. In the Cathedral model, an information seeker uses one source to find information, while the Bazaar model is more open and offers more content options. Jonathan pointed out that there are benefits to libraries using common interfaces, and this sharing of common interfaces can streamline the process of finding information as well as create better processes for those using and updating the software.

The program’s final speaker was Marshall Breeding, the 2012 OBS-SIS VIP. Marshall is a well-known library automation specialist and expert who, until May 2012, held a variety of positions at Vanderbilt University Libraries, but is now an independent consultant, speaker, and author. Marshall titled his section of the program “Competing Visions for the Future of Libraries: OCLC and SkyRiver.” He began by telling the audience he has no biases on this topic, since he has friends at both organizations. He then set forth the competing visions of the two organizations. OCLC sees itself as the entity positioned to bring libraries together worldwide, so OCLC has a global vision. III and SkyRiver, however, offer libraries and consortia competitive alternatives for technology and bibliographic services, thus working on a more local level to assist in the delivery of library and information services.

Marshall also discussed general technology and product development trends. He traced how discovery interfaces have evolved from local to web-scale, via online catalogs to “next-gen” catalogs to web-scale discovery interfaces. Traditional online catalogs can only search and deliver results for the data that is in the ILS, such as books, journals, and media that are cataloged at the title level. Articles, book chapters, digital objects, and website content are not in this scope. During the 2002 to 2009 timeframe, “next-gen” catalogs and discovery interfaces were developed. These catalogs offer features such as single search boxes; query tools (such as “Did you mean…?”) and “type ahead”/auto-fill word capabilities; relevance ranked results; faceted navigation; enhanced visual displays (cover art, summaries and reviews); and recommendation services. The current phase of discovery interfaces is focused on using pre-populated indexes that aim to deliver a web-scale discovery experience. Examples of these products include Primo Central (from Ex Libris), Summon (from Serials Solutions), WorldCat Local (from OCLC), EBSCO Discovery Service (from EBSCO), and Encore with Article Integration.
Marshall’s PowerPoint slides, which are available for free on the AALL2Go website, contain informative and helpful diagrams detailing how traditional catalog, “next-gen” catalog, and web-scale discovery queries are processed.

Marshall offered two general observations about discovery interfaces. First, he feels that web-scale, or indexed-based, discovery is gaining wider adoption in the broader research library arena, although it is not as well accepted in specialized disciplines, such as law. He also feels that these index-based discovery tools are able to provide specialized resources to generalist researchers or for cross-disciplinary research.

Marshall then discussed library management tools, which he defined as the tools that library personnel use to manage collections and automate operations. Again, he provided very helpful diagrams detailing how various models of library management software (LMS) and electronic resource management (ERM) software operate. He concluded that libraries today need comprehensive resource management. It is no longer sensible to use different software platforms to manage different types of library materials. The common ILS + ERM + OpenURL + digital asset management model is very inefficient. Instead, libraries need a flexible platform capable of managing multiple types of library materials and multiple metadata formats, using appropriately streamlined workflows. Marshall feels this new model of library automation should not be an ILS or LMS, since those products were designed to help libraries manage print collections and generally have not evolved to manage electronic collections. Instead, Marshall feels the future lies in replacing the traditional ILS with Library Services Platforms (LPS).

In this new model, Library stands for library-specific software that is designed to help libraries automate their internal operations, manage collections, fulfill requests, and deliver services. Services stands for a service-oriented architecture that exposes web services and other APIs and facilitates the services libraries offer to their users. Finally, Platform describes the general infrastructure for library automation and is consistent with the concept of “platform as a service.” In the LPS model, library programmers address the APIs of the platform to extend functionality, create connections with other systems, and dynamically interact with data. Again, Marshall provided a very helpful diagram of how an LPS operates. He also provided charts detailing the various products library vendors are offering to enter this LPS market. He discussed the following: WorldShare Management Services (by OCLC), Alma (by Ex Libris), Intota (by Serials Solutions), Sierra Services Platform (by III), and Kuali OLE (an open source option from the Kuali Foundation).

Returning to the SkyRiver, III, and OCLC topic, Marshall delved more deeply into the differences between the companies. He explored the private (SkyRiver and III) vs. non-profit (OCLC) business models and structures of the organizations, as well as OCLC’s previous ILS involvement and the organization’s various bibliographic services and other business acquisitions over the years. He also reviewed SkyRiver’s business history, as well as the general competitive environment in the bibliographic services industry over the years. He discussed bibliographic records as a commodity and the intellectual property issues surrounding them. OCLC WorldCat records are currently governed by a Rights and Responsibilities statement. The provisions of this statement are currently positioned as guidelines rather than as restrictions. These guidelines are positioned as consistent with the Creative Commons Attribution License. Both Marshall and Scott noted during their presentations that Harvard University Libraries released nearly 100% of their bibliographic records to the world under the Creative Commons license in April 2012. As for SkyRiver, it asserts no ownership rights to its database of bibliographic records. Increasing numbers of bibliographic records are now freely available, from sources such as the Library of Congress, the British Library, the Open Library, Harvard University Libraries, and other national libraries. In addition, technologies and platforms to aggregate data are increasingly available.

Finally, Marshall speculated that if the ruling in the SkyRiver/III vs. OCLC lawsuit favors OCLC, the industry will stay at the status quo. And he speculated that there will probably be no major impact on OCLC’s WorldShare services no matter what ruling or settlement comes from the lawsuit.

Even without any sensational details about the lawsuit or the vendors involved in it, this program was a rich and worthwhile overview of the lawsuit and the future of library automation. Kudos to the presenters for offering such a top-notch program! I highly recommend reviewing Marshall Breeding’s slides and listening to the videotaped program when and if it becomes available on AALL2Go.
Can you believe it’s been a year already? It seems like only yesterday I was ensconced in a conference room in Philadelphia listening to Jean Pajerek and Patricia Sayre-McCoy present on “The RDA Decision and What It Will Mean for Me and My Library.” Despite the feeling of familiarity engendered by the July heat and the overly enthusiastic air conditioning, it remains an undeniable fact that an entire year has passed since then. This time, our conference room is miles away in Boston. Many of the faces are the same, and the energy, and excitement is still palpable, but one thing is noticeably different – our answers finally outweigh our questions.

Last year, Pajerek and Sayre-McCoy described their experiences with the RDA testing process and training. This year, they have returned, proudly holding their decision to implement RDA before the U.S. national libraries do as one would a well-earned trophy – displaying battle scars, entertaining us, and educating us with anecdotes and best practices learned during the last year. This program detailed their experiences transitioning from AACR2 to RDA, the impact on workflows, productivity, OPAC displays, information retrieval and more. In contrast to last year, dominated by theoreticals, this year both presenters chose to employ the use of PowerPoint, walking us through screen shots and image captures of the innumerable ways RDA has played out in real life and is changing the face of our cataloging processes and procedures.

As always, I love both of these ladies’ senses of humor – a must when dealing with boring cataloging terminology and practices. For example, there is nothing more refreshing and comforting than hearing that you shouldn’t get bent out of shape about periods – it’s a fantastic change from the early stereotypes of punctuation police at their typewriters with stacks of catalog cards, paying excruciating attention to the placement of every single space, comma, and period. These days, while there are still rules about these sorts of things, it’s time to recognize that the world won’t stop turning if you accidentally mistype your transcription. This is what these ladies do – they make you feel your overwhelmed confusion and fear of doing something wrong is normal and that mistakes are commonplace and unavoidable. You have to be brave and deliberate and take a bold step forward into the new frontier and learn with everyone else, bearing in mind that there are no experts and very few “right” answers.

Sayre-McCoy began the program with a one-year recap of the progress University of Chicago libraries have made in the RDA implementation adventure. Major cataloging changes such as “no more rule of three” and “no more abbreviations” were quickly reviewed, but this part of RDA programs now seems obligatory. Anyone who has been keeping up with RDA knows these like the back of their hand, especially since these are some of the most tangible changes to get your head around. The best part is, now that we’ve stepped out of the world of impending and into the world of implementing, all cataloging changes discussed can now be supported with examples and real life tie-ins to how these changes will be useful for patrons.

The 3xx fields were reviewed, and refreshingly enough at this point, the holy triumvirate that represents “printed material” appears as familiar as an old friend. Again, the fear of the newness is slowly waning and being replaced with something entirely different – a feeling of community and eagerness, a chance to smile at each other over the finer points of RDA, and an opportunity to laugh and learn together. As a result, additional bits of information have begun soaking into my brain – for instance, the 3xx fields are a place to exercise caution as a cataloger. Although these fields offer a chance to provide more detailed descriptions for resources, the terms in these fields must be approved by the Joint Steering Committee for Development of RDA (JSC) before you can use them. But it’s this ability to seek approval that is one of the most forward-thinking features of RDA. It’s a living, breathing organism, able to change through the combined efforts and desires of our entire community, not by one or two people making arbitrary decisions.

Through the PowerPoint medium, attendees could see RDA records live as well as screenshots from OCLC Connexion, demonstrating the incorporation of macros and drop-down menus to ease the strain and workload for original catalogers. Even more interesting than the screen shots was learning step-by-step instructions on how to view RDA records in the Library of Congress catalog at http://catalog.loc.gov. Especially for catalogers just hopping on the RDA train, one of the biggest questions is always, “How do they look?” – closely followed by, “How can I find them?” With RDA records being added every day, simply clicking on “Basic Search,” selecting “Expert Search” and then typing “k040 rda” allows you to view RDA records in full or MARC format. During the question-and-answer portion of the program, we also learned that adding “and k955 xg?” to your search terms will limit your results to law-related records. [Editor’s note: Since this instruction was announced, LC introduced a new interface which eliminated the “basic search.” The same search query works if you click]
on "Keyword Search," then select “Expert” from the drop-down menu. However, in light of performance issues with the new catalog system LC then reverted back to their original system, hopefully a temporary measure.]

Sayre-McCoy then discussed training, reviewing some of her favorite sites, such as the Catalogers Learning Workshop at http://www.loc.gov/catworkshop/, where links to LC training materials on authority and bib records are available. With these materials, you can learn at your own pace from the comfort of your own office or workspace – invaluable for those staffs with small budget lines for professional development. Another site worth its weight in gold, especially for a librarian in a smaller operation which subsists mainly on copy cataloging, is Cornell’s wiki on RDA at https://confluence.cornell.edu/display/culpublic/RDA+Documentation. This public wiki contains resources such as Cornell’s copy cataloging policy and associated checklist for accepting and enhancing RDA records, one MARC field at a time.

Pajerek (Cornell Law Library) then took over and began reviewing changes to the RDA Toolkit, authority records, and OCLC Connexion that have taken place over the last year. Starting with a walkthrough of the Toolkit, Pajerek pointed out changes ranging from the simple, such as having icons in place of words and creative commons licenses being required for workflows, to those with higher impact, such as the inclusion of RDA update history. Yes, in the beast that is the RDA Toolkit, you can now find archived text and revision summaries, tracking the long, strange journey that is still in process. One of the biggest takeaways concerning the toolkit was the caution against using its workflows as a crutch, since you absolutely need context for the rules that make up these workflows. Also, these workflows aren’t authoritative – while some catalogers have more experience than others, there are no experts in RDA, and there are no official best practices yet.

Excitingly, a small number of catalogers have begun enhancing their AACR2 authority records with some of the new RDA elements. Don’t fear the mix-and-match approach. All of the information you can enter using RDA turns these bland AACR2 records into upgraded uber-records that make exciting things happen in the linked data arena. Pajerek provided the eager audience with some concrete examples of these enhanced records and then walked us through the use of two new OCLC authority indexes, one on Entity Attributes and one on Relationships. She demonstrated the power of these indexes in enabling retrieval of authority records based on the information supplied in the new MARC fields and subfields.

After bowling us over with the breadth and depth of their knowledge concerning RDA, the presenters took questions from the audience. Startlingly, and in direct contrast to all earlier RDA programs I’ve attended, not one concrete question emerged. The question prompting became a conversation that turned into more of a community effort, with other members of the cataloging world stepping up and sharing their own knowledge, truly driving the point home that there are no experts. We are all learning and launching into this new frontier as a true community, not isolated parts of a whole. All in all, a delightful fact to realize.


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Program Report

Linked Data, Law Libraries, and the Semantic Web

Reported by Melissa Beck
UCLA Law Library

Moderator: Suzanne R. Graham, University of Georgia, Alexander Campbell King Law Library
Speakers: F. Tim Knight, York University, Osgood Hall Law School;
Diane I. Hillmann, Director of Metadata Initiatives at the Information Institute of Syracuse;
John Joergensen, Rutgers University Law Library

Let me begin by confessing that I volunteered to report on this program because I know almost nothing about this topic, but have had the best of intentions for some time to learn. The three speakers, Tim Knight, Diane Hillmann, and John Joergensen, shared basic terminology, concepts, and potential applications for linked data in law libraries.

Tim Knight gave the opening presentation, which provided an introduction to the concept of linked data as well as a theoretical context for the two presentations to follow. Tim began his talk by sharing the now-iconic image of the “linked data cloud,” which, quite honestly, I have always found somewhat horrifying: bunches and bunches of “somethings” seemingly flung out into space, hovering together expectantly. Well, now thanks to Tim, I know that this graphic represents the cloud of linked data sets that are currently available on the Web (most of which also link to other data sets). In the year 2007, there
were twelve connected data sets; today, there are over 300, and the number is growing. That is quite a bit of growth in the cloud in just five years!

But what exactly IS linked data? Linked data is data that has a web-based Uniform Resource Identifier (URI) attached to it allowing both humans and machines to search and find it; often this data is also linked to other (related) data, and together can be retrieved and manipulated for a variety of purposes. While web pages have embedded HTML links to other web pages, which can only be discovered by a human, the Semantic Web takes the data found within these web pages and links it to other data, all of which can be discovered by machine.

Regarding bibliographic data, the card catalog provided an excellent context for searchers, and each card identified important data elements. The development of the MARC format paved the way for the searchable online catalog, and one example of rudimentary linked data for libraries is the hyperlinks to subject headings in the OPAC. There are good links to resources within our catalog, but there is no connection to things that appear outside of our catalog. It is very important that we try to make these connections, as the OPAC is not the first place people come to look for things. If we are not linked on the Web, we will be overlooked.

Some terminology briefly explained by Tim:

Resource Description Framework (RDF): A general framework for describing a website’s metadata; a standard model for data exchange on the web. This is a better way to link to data within and without our library data sets, i.e., our catalogs.

RDF Triple: Two resources with URIs linked by a common attribute which is also given a URI; the three links form the triple. Example: Two resources with the same subject heading + a link = a “triple.”

Sample table:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>23245</td>
<td>hasTitle</td>
<td>Death penalty</td>
</tr>
<tr>
<td>23245</td>
<td>hasSubject</td>
<td>Capital punishment – United States</td>
</tr>
<tr>
<td>(etc.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Resource + Attribute + Value = Subject + Predicate + Object

Diane Hillmann followed Tim’s introductory presentation by asking the fundamental question: How do we really make linked data happen for libraries? We need to find a way to manage without “records” as we know them, and we need to begin talking about linking library data outside of MARC.

Linked data is about machines – it’s not about human-readable things. A library “record” is a container that has many separate digitally-identifiable elements. What we need to do is create and aggregate data in a broader context; there is no one “correct” record to be created. The focus needs to be on vocabularies, and they are far more complex in the Semantic Web world than the thesauri we know and use in the library record-creation world.

XML, the language of RDF and of the Semantic Web, assumes a “closed” world (domain), usually defined by a schema. RDF assumes an “open” world – an infinite amount of unknown data from an infinite number of providers; and therefore, an infinite number of descriptions. There is no notion of a “record” – but statements can be aggregated for a fuller description of a resource.

RDA vocabularies need to ensure the ability to map between RDA and other elements sets, chief among them MARC. There are two hierarchies:

- Unconstrained vocabulary, with no explicit FRBR relationships
- Subset of classes, properties, and sub-properties with FRBR entities as “domains”

The “bounded” properties are the official Joint Steering Committee (JSC)-defined RDA application profile for libraries. Extensions and mappings should be built from the unconstrained properties. Roles and relationships are registered at the same level as elements, rather than as attributes, as MARC does with relators. Aggregated statements are traditionally handled as a whole, e.g., the publication statement. You need to go through the data and use unconstrained properties to make things link together.

Mapping means building relationships between vocabularies, and should not necessarily be a proprietary activity, or tied to particular applications. Our biggest investment has always been in our data, not in our systems. The data is the valuable content that endures.
John Joergensen followed Diane’s presentation by demonstrating what linking library data could look like in a practical application. We can think of RDF as facets leading to entry points, all managed by machines. There is a little less control than in the catalog, with looser connections between things.

Example: A congressional hearing is related to a bill, which is related to a statute, which is related to the original bills which preceded it, which are related to … If this is all linked correctly, you don’t ever have to do a legislative history again — just push a button! Linked data allows separate but related things to be connected if and when it is needed, like “facets on steroids.” Another example: When you search on more than one field at a time in Westlaw, if you create linked data from these fields, you can pull in relevant material as you search.

It’s important to create your own tags, because while most existing schemas are quite good for their stated purpose, they may not be good for your purpose. Think about creating your own tags: e.g., for a court decision — tag the judge as judge and not as author, but use a namespace and declare that “judge” and “author” are related terms.

Namespaces allow you to explain yourself; crosswalks allow you to relate to others.

The presentations were followed by a lively question-and-answer period that, frankly, raised more questions (especially for those of us not very versed in this topic). For further information and self-education, I recommend the following web pages:

- Linked Data (where you can see Tim’s graphic!) at http://linkeddata.org/

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**Program Report**

**Local Systems Roundtable—What Does the Next Generation System Look Like?**

Reported by Ellen McGrath  
University at Buffalo Law Library

Marshall Breeding was the speaker for this program, which was coordinated and moderated by Marjorie Crawford (Rutgers University Law School Library). Mr. Breeding is an independent consultant, speaker, and author. He is the creator and editor of *Library Technology Guides*, in which capacity he is THE expert watching the trends in library automation. To quote Mr. Breeding, he “lives and breathes” this stuff and we are very fortunate that he comes to conferences like AALL’s to share his observations with us. Mr. Breeding was the OBS-SIS VIP in Boston, and he spoke on a number of programs on July 23, 2012.

Mr. Breeding gave a brief historical overview of the development of integrated library systems (ILSs). Back in the 1990s, mainframe-based systems were the norm, followed by the migration to the less expensive client-based systems in the 2000s. Currently, the trend is toward cloud-based systems, a transition that is likely to take approximately another decade in his estimation. These system changes reflect changes in our libraries, as well as technology. There has been a fundamental shift from the need to manage mostly print collections to collections of e-resources, upon which academic libraries spend the majority of their budgets. This shift has been accompanied by a proliferation of systems from many different vendors which all too often do not communicate well with each other in the client-based systems environment.

The cloud-computing systems being offered in today’s marketplace were also referred to as multi-tenant SaaS (Software as a Service) by Mr. Breeding. Vendors host these systems for libraries, thus freeing up library staff time for other work. They offer more predictable annual subscription costs as a way to deal with uncertain budget times. These systems are web-based, with no workstation clients, and upgrades are universal and incremental. They represent movement from individual to highly consolidated or unified workflows. Mr. Breeding prefers the term Library Services Platform as the name for this type of library system now emerging. These are the backend or staff systems, which do not have an OPAC component to them as in the past. Instead they are accompanied by a discovery solution meant to provide a “dazzling” interface to our library’s end users.

The Library Services Platform products available at present are:

- OCLC WorldShare Management Services: A network-level approach to management and discovery; in production in a number of libraries.
- Alma (Ex Libris): A cloud-based system with consolidated workflows and separate zones (community and local); in production in a number of libraries, including Boston College which just went live in early July 2012.
- Intota (SerialsSolutions): A knowledgebase-driven system still in development; scheduled to deliver in 2014.
Sierra (Innovative Interfaces): A hybrid approach, with cloud and locally hosted options; in production at a number of libraries; the most contracts were signed for this system in the past year.

Kuali-OLE (Open Library Environment): An open community-source system focused on interoperability with other campus systems; it is still in development.

This new cycle of transition represents a lot of development resources being invested by system vendors, as well as by libraries assisting them in the process and then replacing our legacy systems. The trend should be away from the present one of dealing with a multitude of vendors/systems in different pieces and parts that may not fit well together and back toward purchasing a suite of services from one vendor. Mr. Breeding predicts that the front (discovery) and backend (management) systems should reconverge and integrate more naturally.

In the Q&A, there was a question about the RDA/MARC transition process. Mr. Breeding commented that we are making baby steps along the path to realizing the benefits of the Semantic Web, linked data, and the design for various metadata schemas. But these are long processes and libraries cannot wait for all issues to be resolved before moving ahead. As the speaker commented early in his presentation, these are interesting times in terms of library systems. I would add that they are highly ambiguous times, in which we are operating on what often feels like the leading/bleeding edge of change, not knowing exactly how our system challenges will ultimately be addressed. I am encouraged, however, by Mr. Breeding’s observations that we will find answers in these developing systems and thus be able to serve our users even more effectively as we move forward.

Program Report

Modeling Subject Authority Data: FRSAD Overview and Implementation Examples

Reported by Michael Maben
Indiana University
Maurer School of Law Library

Coordinator: Ming Lu, Los Angeles County Law Library
Moderator: Pat Sayre-McCoy, University of Chicago, D’Angelo Law Library
Speaker: Athena Salaba, Kent State University School of Library and Information Science

The Functional Requirements for Bibliographic Records (FRBR), published in 1998, were originally conceived as including all bibliographic data. Over time, however, it was recognized that specialized standards were needed in the areas of name authorities (FRAR/FRAD), and then subject authorities (FRSAR/FRSAD). This program featured Athena Salaba, Associate Professor at the Kent State University School of Library and Information Science, discussing the development of FRSAD, its relationship with FRBR and FRAD, and its implementation.

Most of us are familiar with FRBR and its four entities: (1) Work, (2) Expression, (3) Manifestation, and (4) Item, which represent the products of intellectual and artistic endeavor. Eventually it was realized that additional standards were needed for those entities which modify the four basic entities. In 2009, the Functional Requirements for Authority Data (or FRAD) was published for the names of persons, corporate bodies, and families, which were considered as actors related to the basic entities of FRBR. Then in 2011, the Functional Requirements of Subject Authority Data (FRSAD) was published to include concepts, objects, events, and places. These three standards form the FRBR family of requirements for bibliographic data.

Professor Salaba has a unique perspective on this topic because she was the co-chair and secretary of the IFLA working group that developed the FRSAD standards. After providing this introduction to the topic, Professor Salaba discussed how this all works together. It is a complex topic, especially since it involves a whole new language. Since many of us are just learning FRBR, it was difficult to always understand the concepts that were being presented. However, it is clear that FRBR is the basis of it all. Professor Salaba said that every FRBR “Work” is about something; therefore, FRSAD can be applied to anything. A work has as subject a “thema,” and a thema has an appellation of “nomen,” which is “any sign or sequence of signs by which a thema is known, referred to, or addressed.” Consequently, a “thema” is the subject, while the “nomen” is the name of the thema. One example that Professor Salaba used was DNA, which is one thema, but which has many nomens, like DNA, or deoxyribonucleic acid, or thymonucleic acid, or the familiar double helix model. The importance of the thema-nomen model to subject authority is that it (1) separates concepts or topics from what they are known by; (2) provides a general abstract model; and (3) provides the potential for interoperability.

After this discussion and definitions, Professor Salaba provided examples using legal topics within Library of Congress subject headings, Dewey Decimal classification, and Library of Congress classification. These examples displayed hierarchical relationships, associative relationships, and nomen-to-nomen relationships, among others.
This topic is one that will become more prominent over time, as FRBR begins to be more ingrained in technical services with the adoption of RDA. It will require us to learn a new language, adding to its complexity. I expect as this continues to evolve and develop, more will be written and spoken about it.

Professor Salaba cited the paper at http://www.ifla.org/node/1297 for more information about FRSAD, which I found valuable in reinforcing and helping me to understand her talk. The audio and slides of her lecture are available on the AALL2go website.

**Program Report**

**Passing the Baton: Option or Obligation?**

This program on succession planning in law libraries gave practical information for replacing employees who retire; take medical, maternity, or military leave; or otherwise leave their jobs. Wendy Moore (Acquisitions Librarian, University of Georgia) and Meg Butler (Associate Director for Public Services, Georgia State University) presented a lively “dog and pony show” on best practices and practices to avoid.

Communication is the key to successful succession planning. Thinking ahead and having a plan to meet future goals and needs is most important. Coordinating the plan with the library’s strategic plan is best. Planning is a way to identify and train future employees.

Pitfalls to avoid in passing the baton include the following: (1) failure to plan, (2) failure to cross train, (3) failure to provide documentation, (4) being a packrat or allowing employees to become packrats, (5) running out of money (part of poor planning), and (6) allowing rumors to take hold.

To illustrate succession planning practices, Meg and Wendy presented four actual case studies. The first was called the “Great Circulation Apple Cart Turnover,” which happened when three of four circulation staff and one librarian departed in 2010-11 at The University of Georgia Law Library. The plan to succeed each departing employee went well, but the staff discovered that documentation was not comprehensive enough, resulting in some lapses in training. The second case, “Lots of Maternity Leave,” occurred when three librarians at Georgia State University Law Library required maternity leave at the same time. Lessons learned from this situation suggest the importance of informing bosses, supervisees, and co-workers as early as possible of the upcoming leave and deciding ahead of time which responsibilities can be transferred. The third case study involved losing four positions in technical services due to departing employees. This was a prime example of library departmental planning working together with library-wide strategic planning to decide which tasks could be eliminated. The fourth case study involved preparing for a next job.

Successful succession planning involves having agreed-upon, written procedures, regularly cross training; communicating frequently and honestly; using available technology (LibGuides, shared network drives, remote access, Skype); and getting social support through affinity groups. Finally, it is important to trust your colleagues to do a good job if you have planned, communicated, and trained them properly for any upcoming leave.

“Bits of Advice” for those expecting to leave their positions for any reason or length of time include the following:

- Clean out your office, keep files organized, weed, document critical information
- Create a brief written plan covering how tasks are to be handled
- Communicate well before and after taking leave
- Trust colleagues to perform tasks in your absence
- Be sure health insurance is notified and ready
- Talk to your HR representative for advice
- Use affinity groups for social support
- Consult a financial planner if retiring
- Have a plan for your leave – What will you do during that time?

A handout, consisting of an annotated bibliography available on the TS-SIS website, added value to this well-attended and well-presented program.
**Program Report**

**Seminole and Gators: Can Shared Patron-Driven Acquisitions of E-books Overcome the Rivalry?**

Reported by Trina Robinson
George Washington University Law Library

Edward T. Hart and Sarah Pearson, the two presenters representing their universities, spoke of maximizing their e-book purchasing power by combining funds and using patron-driven acquisitions (PDA) to trigger purchases. The first step in carrying out this process was to bring in their vendor to draft an agreement that would satisfy each library’s needs. A profile was created for each school, and titles based on the profiles were loaded into the libraries’ catalogs. When patrons searched the catalogs, these titles were available for viewing. If a title was viewed three times at an individual library, a purchase by that library would be triggered, and that title would become a part of the selecting library’s collection. This method ensures that items purchased are indeed being used by the library’s patrons. If a title is viewed or used only one or two times, no purchase is triggered, and those uses are essentially free of charge. Items viewed once or twice are later considered for collection development purposes.

The purchasing plan was laid out by the third presenter, Erin Gallagher, from Ingram Coutts. In order for the plan to be successful, one vendor had to handle all of the funds and the acquisitions. A deposit account was created for the schools and their plan. As mentioned in the paragraph above, the design of the plan required three requests for a title before a purchase was triggered. That is, if three patrons from FSU requested the same title three times, a purchase of that title was triggered, and FSU would then own one copy of that e-book title and their account would be charged accordingly. The measure of success of the program is yet to be determined, as a large portion of the initial deposit of funds still remains to be spent. Both universities are considering ways to market the program to their patrons for the upcoming year.

The presenters did a great job of keeping the serious subject of acquisitions and tight budgets light and entertaining by weaving in the rivalry between the schools and allowing the vendor to serve as their referee. The delivery was entertaining and informative as well.

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**Program Report**

**Who Wants to Be an Acronymaire? The New Game Show for Law Librarians**

Reported by Katrina Piechnik
Jenkins Law Library

When I started my job at Jenkins over 20 years ago, I was surprised how many times I had to look up acronyms. As a native Polish speaker, this was even more challenging for me, so when I saw this program listed on the AALL schedule, I decided to attend—especially when I saw the names of the speakers: Janet Ann Hedin, Reference/Research Librarian, Michigan State University College of Law; and Brian Striman, Professor of Law Library/Head of Technical Services, Schmid Law Library, University of Nebraska. I knew it would be a great and entertaining program, and it was. Thanks to both of you!

As attendees entered the room, Brian asked them to join one of four teams for Acronym Jeopardy. Of course, I joined in. Janet and Brian, as expected, had thoroughly researched the topic, but I think they overestimated our knowledge. Many of us were clueless about what some of the acronyms actually stood for, even though we use them all the time. We knew what the acronyms meant but did not know the entire term. This was a great, interactive exercise to test our knowledge (or should I say lack thereof).

The program had two rounds. The first round, which included just four small teams, was similar to Jeopardy, but we didn’t have to answer in the form of a question. The second round was open to everyone in the room and was more of a fast-paced trivia challenge. The game was so much fun, especially with Brian as the game show host. Of course, there were also prizes—lots of candy and Boston-themed pencils!

Everyone wanted to know if there was a good source for finding all of these acronyms. Brian and Janet told us that there are different lists out there, but they could not find one that actually had all the names we work with all the time. Janet
is working on a handout that will be a great reference document for us. She is hoping to have it out in the next couple of months and will post it on AALLNET when it is ready. In the meantime—want to play the games?


For the Lightning Round, see http://www.superteachertools.com/jeopardy/usergames/Jul201229/game1342558753.php.

I think this was an excellent refresher for us all. I’m sure this event worked for all types of learners, embedding acronyms into our brains like a branding iron. I can even hear that sizzling sound. Oh, my brain hurts! Getting older does not help, so let us exercise our brains. Since practice makes perfect, perfect your practice. Enjoy!


Continued from page 1

After his introduction, Marshall Breeding began with some figures and statistics reflecting the recent surge of interest in e-books. In America alone, 57 print books are purchased per second, which would be about 78 miles long if you were to shelve one days’ worth of purchased books in a straight row. Print materials aren’t near death yet. The number of Americans owning e-book readers doubled from an estimated 14 million to 28 million, between November 2010 and May 2011. Trade sales of e-books in 2010 totaled $441,300,000. E-books represented more than 8% of the book industry market in 2010, with e-book sales predicted to reach $3 billion in 2015. That’s phenomenal growth. Amazon’s Kindle is the leading e-book reader at nearly 50% of the market, followed by Apple’s iPad at about 30%, with Sony and Barnes & Noble’s Nook sharing the remaining 10%.

So what does all this mean for libraries? In academic libraries most acquisitions departments receive e-books as part of aggregated content packages, and the e-books are being used mostly for research and consultation rather than for lengthy reading. Public libraries are subscribing to e-book services that provide loanable e-books as an outsourced collection. Not surprisingly, school and college libraries are acquiring principally e-textbooks.

Turning his attention toward public libraries, Marshall Breeding discussed OverDrive, a company that touts itself as “the global leader in digital books and more for libraries.” Founded in 1986, OverDrive is based in Cleveland, Ohio. It delivers secure management, DRM protection, and download fulfillment service for publishers, libraries, schools, and retailers. It currently hosts more than 650,000 digital titles from more than 1,000 publishers. About 15,000 libraries, schools, and colleges worldwide use its digital distribution services. Marshall then showed a slide of a screen capture of Nashville Public Library’s OverDrive webpage. The service is integrated with the library’s webpages, so it looks like part of the rest of the library’s offerings and resources, with adequate explanations as to the requirements for patrons to access and use OverDrive.

3M Cloud Library is another e-book commercial service for libraries. It allows patrons to use personal accounts to access e-books on their readers. There are some pretty nifty features of this product, including the ability to check-out books, take notes while reading, and bookmark a stopping place.

Not to let an opportunity go by, Bibliotheca has partnered with libraries to provide noticeable discounts for aggregating e-book purchases. The company claims to have built its concept, which includes title ownership, around the Douglas County Libraries in Colorado. They are working to lower the cost of e-books via library consortiums or other cooperative purchasing, and to seamlessly integrate e-books with their ILS. Their use of open source applications is a positive move away from proprietary models that can limit the usefulness of the libraries’ shared basic platform. They aren’t pushing the mass-market e-book potential, but offer local and special titles.

Marshall Breeding highlighted Library Renewal, a recently-formed organization focused on exploring new models or technologies for making e-books available in libraries. A vendor called Library Ideas is offering a service called “Freading,” with no upfront cost, no download manager, a collection of 20,000 titles to start, and simultaneous access to all titles. Like the idea of having over one million free e-books? Visit Open Library. They have an “only e-books” search box which makes it quick and fun for visitors to browse or search for specific titles which are in the public domain, available for download, PDF, or online reading. As an example, here’s a link from a search result asking for Henri Bracton in Open Library: http://www.archive.org/stream/delegibusetconsu01brac#page/n7/mode/2up.

Unglue.it, available at http://unglue.it, brings the crowdfunding model to e-books. “Unglue.it is a place for individuals and institutions to join together to give their favorite e-books to the world. It works with rights holders to decide on fair compensation for releasing a free, legal edition of their already-published books, under Creative Commons licensing. Then
everyone pledges toward that sum. When the threshold is reached (and not before), we collect the pledged funds and we pay the rights holders. They issue an unglued digital edition; you’re free to read and share it, with everyone, on the device of your choice, worldwide.” — (quote from their website 8/20/2012). Doesn’t that sound pretty cool? It’s much more complicated than you might imagine. But wait; there’s this thing called crowdfunding, and Amazon.com isn’t comfortable with it. This is hot-breaking news and quite interesting. Amazon is no longer processing pledge payments for Unglue.it. Do a Google search Unglue.it and Amazon, and enjoy the reading.

Mr. Breeding spent the remainder of the presentation on challenges and issues for libraries and e-books. Some basic categories included technology issues, legal issues, and the challenges e-books present to library workflow. A summary of everything he covered would be too long for this report, so the narrative below combines most of the issues.

The integration of e-books into existing systems means that libraries need to work together more as cooperatives in order to acquire e-books at reasonable costs, and to become familiar with licensing options such as access versus various degrees of ownership, and knowing that if they switch e-book providers they will need to re-purchase the same e-books. Once the online texts are purchased, libraries need to plan for loading catalog records with proper and appropriate linking mechanisms, and for coping with the inability to see the availability of an e-book from a library’s OPAC or platform gateway.

The purely technological aspects of e-books and libraries are challenging on several fronts. There’s new terminology to learn and understand as it emerges, e-book access via Digital Rights Management (DRM http://en.wikipedia.org/wiki/Digital_rights_management), access limits imposed by certain hardware devices which work with DRM, establishment of user credentials, and no “first sale doctrine.” Publishers determine the rights, access, and delivery mechanisms of their products.

Libraries are well-known for their no-fee lending and access to online resources. In the world of e-books, libraries must work toward a legal framework that preserves their role and value in providing access to materials without cost, and offering a user-friendly experience. It should be easier to “borrow” an e-book from a library than an online store.

Marshall Breeding’s PowerPoint presentation is available at http://www.librarytechnology.org/ltg-displaytext.pl?RC=17102. His email address is marshall.breeding@librarytechnology.org.

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**TSLL EDITORIAL POLICY**

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