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Program Report

Hip Tips for the Acquisitions Librarian

*Trina Robinson
George Washington University*

This one hour and 15 minute program took on the challenge of sharing tips for success in acquisitions, a specialty that gets little attention in the classroom in library school, and much, if not all, training is done on-the-job. The panel sharing their wisdom and insight who made the brave attempt to fill that gap included Ajaye Bloomstone (Louisiana State University), Alan Keely (Wake Forest University), Ian Kipnes (California Western School of Law Library), Jean L. Willis (Sacramento County Public Law Library), and Shyama Agrawal (Duke University School of Law).

In a short 75 minutes, three major areas of acquisitions work were addressed: (1) choosing and getting the stuff; (2) management of people and time; and (3) managing the stuff. Issues of print versus online, dealing effectively with vendors, negotiating discounts, and seeking out best deals were discussed right from the start. The panel hit the ground running giving advice, sharing experiences and engaging the audience on topics that are critical to success in acquisitions. Tips to stretch budget dollars included negotiating advance discounts and breaks on shipping costs, either free or discounted. Tips were also shared on managing large purchases from a single vendor/publisher, such as breaking them down into smaller, more manageable chunks of purchases when possible. Claims, consortia, and authority to sign contracts were also covered.

Managing personnel and repurposing staff in a constantly changing environment with positive results is critical in today's acquisitions departments. Tips on how to keep staff involved and engaged were offered and shared among the group, panelists and attendees. The panel also discussed workflows for purchases once they arrive to the library. Finally, participants were encouraged to share their business cards for the purpose of establishing a network of colleagues to contact when problems arise.

This program definitely delivered—it offered something for everyone. It offered a wealth of tips for newer acquisitions librarians and even had much to offer those of us who have spent much of our careers in acquisitions. Even with my 18 years as an acquisitions librarian, I heard tips that were new and inventive. Although not all tips would work in all libraries, no matter what library environment you are in, this session had something to offer. The session was participatory in its delivery, and it provided a great opportunity to meet likeminded colleagues.

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

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Online Bibliographic Services Special Interest Section

Behind every successful group endeavor are people who dedicate much time and energy into “making the magic happen” in an effortless and seamless manner. Online Bibliographic Services Special Interest Section (OBS-SIS) is no exception to that rule, and I want to start my first column as OBS Chair by giving **heartfelt thanks to three terrific Executive Board members: Chris Tarr, Corinne Jacox, and Katrina Piechnik.**

At the American Association of Law Libraries (AALL) Annual Meeting in July 2014, Chris finished three years of service on the Board, starting as Vice-Chair/Chair-Elect in 2011. Throughout her time on the Board, Chris demonstrated terrific leadership skills, consistently provided sage advice, and displayed good humor and a sense of humor. She also organized terrific programming for the 2013 AALL Annual Meeting in Seattle.

Corinne also completed her service on the OBS Board in July, having served a two-year term as a Member at Large. She represented OBS on the 2013 annual “Alphabet Soup” Reception committee, and demonstrated her terrific project management skills by managing all aspects of the OBS table in the Activities Area of the Exhibit Hall at the 2014 AALL Annual Meeting. The Board will miss Corinne’s wisdom, engagement, and good humor.

A special thank you is extended to Immediate Past Chair Katrina for her leadership, enthusiasm, good humor, and great ideas over the past two years. Luckily, Katrina will serve one more year on the Board and be a valuable resource for me and the other Board members. Katrina chaired the 2014 OBS Education Committee, which created two wonderful programs for the Annual Meeting. The first was “Open Source Software: a Community and a Philosophy of Freedom,” presented by the 2014 OBS-SIS VIP Nicole Engard. Nicole is a great speaker and gave the audience practical advice about using Open Source Software (OSS), including a list of very useful OSS options for daily tasks. If you missed the presentation, her slides (which include the list of OSS options) are available on the OBS website at <http://www.aallnet.org/sections/obs/documents/Annual-Meeting-docs/2014/index.html>. The second OBS-sponsored program was “ORBIS Cascade Alliance Summit: a Library Management Service Model for the Future.” This program discussed implementing a large consortium system from the viewpoint of a technical services librarian, a reference librarian, and a law library director, and attracted a large audience of both public services and technical services librarians. Reviews of both of these timely and useful programs are in this issue of *Technical Services Law Librarian (TSLL)*, and I felt they were among the highlights of my time at the Annual Meeting.

Four new members join Katrina and me to form the 2014-2015 OBS Executive Board. In April 2014, **Melanie Cornell was appointed to fill the Secretary/Treasurer position** that was left vacant when Elaine Bradshaw resigned. Melanie will serve on the Board until July 2015. In May 2014, the **OBS membership elected Barbara Ginzburg to serve a two-year term (2014-2016) as Member at Large, and Marjorie Crawford to serve as Vice-Chair/Chair-Elect. Jennifer Noga was appointed in late July 2014 to fill the Member at Large position** left vacant when Ilona Tsutsui resigned earlier in the month. Jennifer will serve on the Board until July 2015.

OBS and I both hit the ground running during the 2014 AALL Annual Meeting. As the OBS Chair, I also serve as the Chair of the OBS Education Committee. During the Annual Meeting, the OBS Education Committee learned that the **Annual Meeting program proposal process will be revamped for the 2015 Annual Meeting.** The program proposal site opened in late August with a list of “must have” programs in six content areas (see <http://www.aallnet.org/conference/education/future-meetings/program-proposers> for more details). **The fourteen-member OBS Education Committee, which includes a nice mix of newer and “veteran” OBS members, plans to propose programs on at least these (and possibly other) topics: (1) BIBFRAME; (2) the National Information Standards Organization’s (NISO) new Open Discovery Initiative; (3) using Google Analytics to track usage statistics; (4) a “Next Gen ILS/Discovery Platform” vendor showcase; and (5) electronic resource discovery issues in catalogs.** Please feel free to suggest other program proposal ideas, especially if they fit into any of the “must have” program topics.

Those who follow the OBS listserv will remember that I solicited volunteers in July to fill a two-year term for an **OBS representative on the TSLL Editorial Board.** **Marijah Srcoczynski** will serve on the Board for the 2014-2016 term, joining our other OBS representative, **Barbara Szalkowski**, who will serve until July 2015.

In other news, a **Task Force to Revise the Procedures and Guidelines of the OBS/TS Joint Research Grant** was created in early August. Please stay tuned for more information as the work of this task force progresses.

In closing, I want to thank the OBS membership once again for electing me into this leadership position. **In my personal and professional lives, I highly value communication and collaboration.** For that reason, I plan to keep the OBS membership as informed as possible about relevant OBS and AALL news and issues. I also strive to encourage and support OBS members to participate in OBS activities to the extent that their time and interest allow. **For your part in the communication and collaboration process,** watch the listserv for news and chances to become involved, and please don't hesitate to contact me or any other OBS Board member to share ideas, questions, concerns, or feedback.

Best wishes to all for a safe, happy, and productive fall season!

*Karen Selden
University of Colorado*

From the Chair

T

echnical Services Special Interest Section

Owning the Technical Services Special Interest Section (TS-SIS)

I admit that my mind thinks in lists and bullet points. Without intending to be funny or officious, I once left a note for my future husband as:

- a) A group of us are going to Godfather's for pizza and karaoke at 7.
- b) I'd like you to come.

Luckily, he found this analytical side more endearing than off-putting. He showed up, sang "Brown-eyed Girl," and we are living our happily ever-after. I hope you all will accept this quirk, too.

- a) TS-SIS is an incredibly talented and dynamic group.
- b) Our profession is being squeezed and questioned.
- c) We have to have a plan (several plans) and work hard to execute it (them).
- d) I'd like you to help.
- e) We need your help. Own TS-SIS—make it yours.

That's really the five-point gist of my column. I want everyone to know what TS-SIS is doing, for our members to engage as they are able, and to make TS-SIS activities and discussions professionally meaningful to them. What follows are just a very few teasers and contacts for chipping in.

Annual Meeting: Our Education Committee chair, John Jensen, started a great conversation about a month ago around the "must-have" topics for next year's Annual Meeting. We now know that BIBFRAME, RDA, linked data, e-books, discovery solutions, and financial intelligence are among the thirty must-haves. Let's go! John's group is ready to help you form a program out of vague thoughts, to connect you with co-presenters, or to put the finishing touches on your masterpiece of a proposal. The deadline for proposals is October 6 at 12:59 a.m. (EDT). Check out the 2015 American Association of Law Libraries (AALL) Annual Meeting site for tips on drafting program proposals at <http://www.aallnet.org/conference/education/future-meetings/program-proposers>.

- If you are interested in participating either in the presentation stage or in the planning stage of a program, don't hold back. Please let me know. We need your involvement.

Professional Development: Responses to our member survey confirmed the six-year trend that, for any given year, more than half of us do not attend the AALL Annual Meeting. Stephanie Schmitt and the Professional Development Committee are spearheading an effort to get more professional development opportunities to more members in the comfort of their offices. Specifically, we hope to host several e-forums to continue those great conversations started at the 2014 Annual Meeting and to launch new ones. We hope to roll out a new slate of online-based learning. The best part of our last board meeting was the energy surrounding all the continuing education goals expressed by many of our committee chairs.

- Have you led a webinar? Have you developed or moderated a webinar? Please let me know. We need your technical and creative insights from those experiences.

-
- Have you participated in an Association for Library Collections & Technical Services (ALCTS) e-forum? Please let me know. We need your insights and opinions.
 - Have an idea for a video tutorial? Please let me know. We need your ideas for on-demand tools that our members will use.

Awards: All of which reminds me that everything costs money. Last year, an ad-hoc group made recommendations to expand the number of education grants that TS-SIS offers. Jennifer Noga, her current committee, and the Executive Board of TS-SIS are working diligently to make these recommendations a reality this year.

- Want to attend big ticket educational opportunities? We need you to apply and give us feedback on the process.

Joint Research Grants: Speaking of applying, I am sure many of you encounter questions for which you'd love to have more data or analysis of the impact of X on Y. Kerry Skinner and the members of the Joint Research Grant Committee are taking a fresh look at how the grants may be used and the application process. But don't wait! When you get Kerry's call, take a moment and apply for a Joint Research Grant to cover any related costs of investigating your answer. More information on the grants is available at <http://www.aallnet.org/sections/obs/committees/joint-research-grant-committee>.

- Do you need some software to crunch numbers or to provide proof-of-concept? We need you to apply for a grant and test those theories.

Of course, much more is happening. All of our committees are active already and creating buzzes. You'll see updates on the TS-SIS myCommunities posts. Feel empowered/encouraged/expected to respond. Own TS-SIS.

Let's talk more.

*Suzanne Graham
University of Georgia*

From the Editor

Welcome to the conference issue of the *Technical Services Law Librarian (TSL)*. In this issue, you will find reports from different technical services programs from the 2014 American Association of Law Libraries (AALL) Annual Meeting in San Antonio, along with both sections' meeting minutes and reports from representatives and grant recipients. I hope you find this issue informative as a record and review of the San Antonio Annual Meeting, as well as a look forward to the 2015 Annual Meeting in Philadelphia. Finally, I would like to acknowledge the work that Michele Thomas has done for this publication as the Associate Editor. This is the final issue edited by Michele as she has left law librarianship to enter the practice of law. Michele has done a yeoman's work with *TSL*, and she has my gratitude and appreciation.

*Michael Maben
Indiana University, Bloomington*

Registration is Open for Law Library Managerial Leadership Online Course

As a library professional with many skills and abilities, it is important to expand those capabilities with knowledge that will help your library succeed. Building your library management competencies positions you to assist your organization for long term success. Register today for the Law Library Managerial Leadership Online Course. This five-week online course will give you the opportunity to improve your managerial leadership effectiveness, learn from experts in the field, engage with a small group of your peers, and learn practical skills that you can apply immediately. This online course will be held from October 8 to November 13 and is designed to help you advance your career potential. Space is limited for this online program. Registration is now open.

Technical Services Law Librarian (TSL) Annual Report Covering July 2013-June 2014

TSL volume 39 had four issues, published in PDF, and is available on the *TSL* website at <http://www.aallnet.org/sections/ts/TSL/Issues>, and on HeinOnline at <http://heinonline.org/HOL/Index?collection=aallar>. Michael Maben completed his first year as *TSL*'s editor-in-chief and was very grateful for the excellent assistance provided by Michele Thomas, Associate Editor; Julie Stauffer, Layout and Design; and Martin Wisneski, Web Manager. The September, December, and March issues were released on schedule. The June issue was delayed slightly due to a family emergency for our Layout and Design Editor Julie Stauffer. The work done by these dedicated columnists and editors is greatly appreciated by the editor-in-chief.

There were a few columnist changes through the year. Trina Robinson stepped down from the Acquisitions column with the December issue. Beginning with the March issue, Anne Myers agreed to write that column. Also with the December issue, Ashley Moye stepped down from co-authoring the Description and Entry column, but she proposed a new column called Library Metrics. This column made its debut with the June issue. Mary Lippold stepped down from writing the Management column after the March issue due to her retirement. Finally, Erin Harper stepped down from coauthoring the Private Law Libraries column because she was leaving law librarianship. She accepted an officer manager position with an architectural firm.

Concerning the editorial staff, Michele Thomas began to transition off as Associate Editor with the June issue. Michele has left law librarianship to enter the practice of law. The position was posted on the Lawlib list, and after considering the applicants, the board selected Sabrina Davis as the new Associate Editor. Sabrina worked with Michele on the June issue.

Finally, with the Editorial Board, Christine Dulaney resigned from the board because she accepted a position at the Bender University Library at American University. Her term expired this year, so the position was left open for the incoming Technical Services Special Interest Section (TS-SIS) chair, Suzanne Graham, to fill. The other Editorial Board members for 2013-2014 were Victoria Sukhol, Barbara Szalkowski, and Catherine Kellett, and their support has been greatly appreciated.

In addition to all the regular columns, *TSL* also reprinted an interview Professor Joe Janes gave to the *iNews*, a publication of the University of Washington's Information School. Professor Janes and the University of Washington gave *TSL* permission to reprint the interview. *TSL* also received some outside recognition by the PinHawk Librarian Daily Digest which was picked up by the Spectrum blog, citing the content of our March issue.

We will look forward to another robust year, beginning with our Conference Issue in September.

*Michael Maben, Editor-in-Chief
Indiana University, Bloomington*

AALL2go Pick of the Month – “What Makes a Librarian Worth a Million Bucks?”

AALL's Continuing Professional Education Committee presents the AALL2go pick of the month: “What Makes a Librarian Worth a Million Bucks? Valuing Staff, Resources, and Services When Dollars are Scarce.” In recent years, libraries have been faced with ever-increasing budget cuts. Therefore, librarians must be able to accurately and concretely demonstrate the value of the library to their law firms and law schools. In this presentation, two law firm library managers provide a practical, dollars-and-cents approach to determining and demonstrating the value of your library. The presenters demonstrate how to apply the “Value Assurance Cycle” (Audit > Align > Appraise > Act) to your library's staff, resources, and services. The presenters include worksheets for accurately calculating costs and value. They also provide creative tips for demonstrating and highlighting the value of your library's assets, including soft skills, through the use of charts, graphs, and storytelling.

Find this and more free continuing education programs and webinars for AALL members on AALL2go!



**Online Bibliographic Services Special Interest Section (OBS-SIS)
2014 Annual Business Meeting
Monday, July 14, 2014, San Antonio, TX**

MINUTES

OBS Chair Katrina Piechnik called the official meeting to order at 5:28 p.m.

The first order of business was honoring Jack Bissett for his many years of service to OBS and the profession. Katrina presented him with a plaque and the memory book that colleagues signed at the OBS Activities Table. Jack took a few moments to thank the group and reminisce about his years participating in American Association of Law Libraries (AALL) and OBS activities.

Technical Services Law Librarian (TSLL) Editor-in-Chief Michael Maben reported that four issues of *TSLL* were published over the past year; three were on time and one was slightly delayed. There was some turnover of columnists and an Advisory Board member, but all positions are currently filled. A new column on Library Metrics was added this year. Former *TSLL* Associate Editor, Michele Thomas, left to enter the practice of law, and the new Associate Editor is Sabrina Davis. Michael is always looking for interesting and timely articles to publish, so please contact him if you have any interest in publishing an article in *TSLL*.

Awards to outgoing officers:

Katrina Piechnik, outgoing Chair, was recognized for her busy year of dedicated service to OBS-SIS while serving as Chair. She noted that, despite its size, OBS-SIS is very productive: OBS has produced two Presidents of AALL, and OBS members regularly contribute content to *TSLL* and produce a lot of practical work and programming for both AALL and fellow OBS members.

Christina Tarr, outgoing Past-Chair, was recognized for her leadership, creativity, and various contributions to OBS-SIS.

Corinne Jacox, outgoing Member-at-Large, was recognized for her valuable, detail-oriented, and creative work for OBS-SIS.

Karen Selden, incoming Chair, was recognized for her hard work over the past year, and was presented with the official OBS-SIS baseball cap by Katrina. The tradition of the OBS-SIS baseball cap (which is pictured on the OBS Facebook page) began in July 2004 when incoming OBS Chair Georgia Briscoe presented outgoing OBS Chair Kevin Butterfield with a customized OBS-SIS baseball cap, to commemorate both Kevin's time as OBS Chair and his love of baseball. When Kevin left the OBS Board the following year after serving as Immediate Past Chair, he presented the cap back to Georgia, who passed it on to the new incoming Chair, Richard Jost. The cap has been handed down from OBS Chair to OBS Chair ever since. During her time in office (2011-2012), OBS Chair Betty Roeske asked former OBS Chairs to send her a pin from their institution or state to add to the cap, and thus was born a second tradition. Now, each OBS Chair adds a pin from their state to this official "hat of leadership" before they hand it to the next incoming Chair. Katrina expressed great pleasure and confidence in passing the leadership (and cap) to Karen because she has many good ideas for programming.

Programming for 2015:

Karen Selden spoke about upcoming OBS-SIS programming. The Annual Meeting Program Committee (AMPC) has a table in the Activities Area where they provided handouts explaining the new program proposal requirements for the 2015 AALL Annual Meeting, including six competency areas that the AMPC will use to group program proposals. Karen will give this information to the OBS Education Committee members at the meeting at 7:00 a.m. Tuesday morning, at Conference Center Room 210B, where the committee will talk about programming ideas and strategies. The 2015 OBS Education Committee is comprised of thirteen members, a good mix of veterans and new people. Most of their work will be done via email. Small groups will work on proposals independently, and then the larger group will review and edit the proposals for clarity, proper learning objectives, etc., before the proposals will be submitted to the AMPC. The 2015 AMPC Liaison for OBS is Mary Matuszak of the New York County District Attorney's Office.

Activities Table report:

Corinne Jacox, Member-at-Large, reported on this year's OBS Activities Area table. She brought 600 assorted puzzles for the table, which also features candy. There will be two raffle drawings: a drawing for pottery that Katrina donated, and a drawing for a free OBS-SIS membership.

Wrap-up:

Karen Selden again thanked Katrina Piechnik, outgoing Chair, for all her work and cheerfulness.

Christina Tarr, outgoing Past-Chair, reminded members to come to the “ORBIS Cascade Alliance Summit: a Library Management Service Model for the Future” program on Tuesday morning.

The meeting was adjourned at approximately 5:50 p.m.

*Respectfully submitted:
Melanie Cornell, Secretary/Treasurer, 2014-2015*

**Technical Services Special Interest Section
2014 Annual Business Meeting
Sunday, July 13, 2014, San Antonio, Texas****MINUTES**

Call to order: Brian Striman**Verification of Quorum: Hollie White**

At 46 members, we have met the required 30 member quorum requirement.

Appreciation for Technical Services Special Interest Section (TS-SIS) VIPs: Jill Emery and Graham Stone**Approval of Minutes from July, 14, 2013 Business Meeting in Seattle, WA**

Motion to approve; Ishmael moves to approve. Seconded by Eric Parker. Minutes pass.

Special report from Caroline Walters regarding the Vendor-Supplied Bibliographic Records Task Force (VRAG) Report

The committee formed in November 2013 to investigate the current landscape of vendor created bibliographic records. The report was finished. The next step is for VRAG members to talk to vendors. This process started today with a meeting with Lexis. The Task Force is hoping that VRAG will be a group that inspires others to work in this model.

Executive Board Reports**Secretary/Treasurer: Hollie White**

Report is online. Highlights from this year are TS currently has \$22,767.43 in our account, and we had a 25% participation rate in this year’s elections. Approved by Carol Collins. Seconded by Alan Keely.

Members-at-Large: Cindy Spadoni and Eric Parker

Cindy was in charge of the Alphabet Soup reception last night. Due to new AALL requirements, the reception must take place at the convention hotel. The TS-SIS recognizes and appreciates the support of Innovative Interfaces for their continued support of this reception.

Eric’s report is online. Eric was involved with the Biennial Membership Survey, which had a 19% response rate (approximately 122 people). Responses were compared to the survey results from previous years. The silent auction is underway and will end tomorrow at 4pm.

Vice-chair/Chair-Elect: Suzanne Graham

Suzanne and Eric tried to refine the questions in the Biennial Membership Survey to make it more concise. One finding was about 40% of the membership could not attend the meeting. The membership volunteer survey was also included, which added to its length. Volunteer information was used to help populate committees. Chairs have been identified and have a deadline of August 1st to finalize member rosters. All incoming chairs were recognized and asked to stand.

Two new grants for experienced members and a new award for a person to participate in the leadership academy will go into effect next year.

Chair: Brian Striman

Brian highlighted what happened at this annual meeting. Brian was very excited about all the ways we were involved this year. Brian attended the Conference of Newer Law Librarians (CONELL) marketplace and met some new members. Grants

that we awarded this year: Michelle Modic received the Marla Schwartz Grant; Sabrina Davis and Ning Han received educational grants to attend the 2014 Annual Meeting, although Ms. Han was unable to attend due to a last minute emergency.

Standing Committee Chair Reports

Acquisitions: Trina Holloway

Diana Jacque reported on behalf of Trina. One major project from Acquisitions was a list of state statutes and vendors for each. That will be up on the website soon.

Cataloging and Classification: Lia Contursi

Resource Description & Access (RDA) update for Treaties was approved and is now available online. Implementation of genre terms is continuing. Committee is still working on strategies to implement. Committee members have formulated some best practices, and they will propose more as needed.

Preservation: Lauren Seney (Hollie gave a brief update in her place.)

Lauren is not at the conference. Worst book contest competition winner was announced in early July. Preservation was holding a word scramble competition at the TS table.

Serials: Jacob Sayward

Exchange of duplicates program will be wrapping up this year. This fall is the last year. Many thanks to Pat Roncevich.

TSLL Report: Michael Maben

Columnists were recognized. Michael completed his first year as editor-in-chief. *TSLL* produced four issues online, which are included in Hein. The June issue was the only slightly delayed issue. Michael's report will be online later this month. A few columnists have changes this year: Anne Myers is now writing in Serials; Private Law Libraries column needs more help; Ashley Moyer will write a column on library metrics.

Awards: Carol Morgan Collins

Carol thanked the members of the committee this year. The committee awarded three educational grants totaling \$2,500 this year. Michelle Modic received the Marla Schwartz Grant, while Sabrina Davis and Ning Han each received general educational grants. A newly formed ad-hoc committee will work on making grants available for experienced members.

Renee D. Chapman Memorial Award

John Hostage is the winner this year. George Prager introduced the recipient.

Special Recognition of TS Retirees

This year the board would like to recognize:

Jack Bisset
Susan Goldner
Angelina Joseph

Thank you for your contribution to TS over years.

Words of Appreciation: Brian Striman

Brian expressed his gratitude for the all the support from TS-SIS.

Passing of the "gavel" and the Sturgis Rules

Brian expressed his appreciation of all of Suzanne's work this past year.

Comments from the New Chair

Suzanne recognized the outgoing chairs for their contributions. Suzanne recognized the new board members. Brian received a plaque from the membership recognizing Brian's enthusiasm and leadership over the past year.

Suzanne presented her goals for the year: (1) to reach out to each member of TS-SIS to make it a positive experience; (2) to take advantage of the opportunities that change brings; (3) to let people share their stories and expertise; (4) to expand educational opportunities beyond the Annual Meeting (e.g., more webinars); (5) to include more taskforce-oriented work using project-based approaches; and (6) to look at how we are doing at the Annual Meeting.

Motion to adjourn; seconded. Meeting adjourned at 6:32pm.

All officer, committee, and representatives reports will be available on the TS-SIS website.

**Acquisitions and Serials Standing Committees
and Roundtables Meeting Minutes
2014 Annual Meeting
July 14, 2014, San Antonio, Texas**

MINUTES

The meeting was called to order at 7:00 A.M. by Trina Holloway (Georgia State University), Chair of the Acquisitions Standing Committee.

Approval of the Acquisitions Standing Committee and the Serials Standing Committee Minutes

Ismael Gullon (Mercer University) moved to approve the minutes from the Acquisitions and Serials Standing Committees Roundtable and Meeting from the American Association of Law Libraries (AALL) 2013 Annual Meeting in Seattle. Wendy Moore (University of Georgia) seconded, and the motion carried.

Presentation:

Melody Lembke (University of California, Irvine): Microsoft OneNote presentation

Melody uses OneNote as part of the Collection Development at Irvine, where it has been well-received. She uses it to forward selection of individual titles to staff members and to record their decisions. It is especially helpful when collection development services are split up among different individuals. Melody includes GreenSlips and email information about books for individual selectors, who can then easily review the titles and indicate whether they are interested. She includes in OneNote any request she has received for an electronic item, and she can also add symbols to the individual items.

OneNote is part of the Microsoft Professional suite of products, and there is a Microsoft OneNote video tutorial online. It is very likely that your library has this product already. The key to using OneNote is to be consistent about the data input.

Question: What is the advantage of using this program over Google Docs? Melody's IT department discourages the use of Google Docs because it is insecure. Keep in mind that this database contains budget information.

Question: Can this be posted online? Melody will look it over and see.

Question: Are there different levels of authority on these? Melody says that it is possible to secure these and lock them down so that they are not seen by everyone at your institution.

Roundtable Discussions:

Cancellation Project Workflows:

One library is using an Access database to track cancellations. This allows multiple people to see the document at one time.

Another library showed their cancellations spreadsheet to the American Bar Association (ABA) site visit committee. Their spreadsheet contains the rationale for each of their cancellations. They had hoped this would convey that the cancellations were carefully considered, and that there may have been duplicate publications online. In some instances, when there was money left at the end of the year, the library was able to bring back a title for an additional year.

Another institution shared that they put in the three-year average price of a title instead of the invoice price in their spreadsheet.

Another library's cancellation spreadsheet was taken to the faculty meeting so that the faculty would be aware of the cancellation decisions made. This helped to bring home how a lack of budget for the library affects what they can retain.

Electronic resources: specific topic to be determined at the table

IntelliConnect: One library is considering getting rid of the less-used portions of IntelliConnect. Some libraries report increased usage once the catalog records are loaded into their catalogs. One librarian strongly suggested that we urge WoltersKluwer to provide records as part of the cost of IntelliConnect. Jacob let people know about the Technical Services Special Interest Section (TS-SIS) task force about vendor-supplied MARC records.

E-books: Some purchases have been in response to individual faculty requests. Libraries have purchased Oxford and Cambridge law e-book collections. One library asked state-supported schools: Does your institution allow you to have an e-book downloaded to a specific faculty member's device? Some libraries are sending the book to a dedicated library device such as a Kindle. What about using research funds for books to be downloaded to a faculty member's personal Kindle? This is not allowed in some public institutions because it is paid from state money.

Duplication of journal titles across aggregator databases: There are some tools out there to determine the overlap of certain databases. We sometimes end up buying the same title over and over!

Education Programming for 2015

Committee members suggested the following topics for 2015 programs:

1. Dealing with vendor records when you are NOT a cataloger (worked up for 2014, resubmit)
2. Next-generation integrated library systems (ILS); BibFrame
3. Discovery Layers: Use of EBSCO Discovery Service (EDS) by some (service good for consortia); Blacklight
4. Electronic Data Interchange (EDI): Encourage more vendors to use EDI; time consuming
5. How to deal with budget cuts: What to do when the library's bottom line does not increase, but firms hire new practice groups and law schools hire new faculty members? How can we best communicate the difficulty of this to administration and purchase the necessary resources?
6. Academic Law Libraries: Growing your relationship with your campus' main library
7. Numbers and statistics: How to turn these into something you can present to someone outside of the library and make your business case; return on investment
8. Negotiation: A broad program would be great; our vendor representatives are trained in this, but most librarian are not. In addition, we negotiate with our staff. Focus on tools and skills to be better at that.
9. Future of technical services: Our departments are shrinking; finding new roles for technical services staff such as stacks management or compiling the institutional repository.

John Jensen is the incoming chair of the TS-SIS Education Committee for 2014/15.

Suzanne Graham (TS-SIS Chair) is emphasizing professional development/educational opportunities this year.

Reports:

1. Exchange of duplicates: The exchange is ceasing as we know it. Many libraries are no longer binding and the Fall 2014 exchange will be the last one in its present incarnation. This could take a different format in the future, if there is interest. Contact Jacob Sayward with any suggestions.

2. State statutes project: Many libraries are cancelling state statutes because of the cost. This year, the Acquisitions Standing Committee compiled a list of state statutes for sale by each state at a reduced price. This project is now accessible via the Acquisitions Standing Committee's web page.

The meeting adjourned at 8:12 AM

*Submitted by Diana Jaque
USC Law Library*

Cataloging and Classification Standing Committee

Meeting Minutes

2014 Annual Meeting

July 13, 2014, San Antonio, TX

MINUTES

The meeting was called at about 7:05 a.m. by Lia Contursi.

A sign-up sheet was circulated. There were approximately 40 attendees. Lia announced that Pat Sayre McCoy ended her term as American Association of Law Libraries (AALL) Representative to the MARC Advisory Committee (MAC). Her successor is Jean Pajerek, who will serve from July 2014 to July 2017. Pat was not able to attend AALL in San Antonio, but she prepared the report of the latest MAC Meetings at the American Library Association's (ALA) annual meeting in Las Vegas. Jean Pajerek kindly agreed to read the report.

MARC Advisory Committee (MAC) – Pat Sayre-McCoy

Proposal no. 2014-06 for the new subfield 388 for Time Period of Creation Terms was approved as amended. This proposal addresses the need to record the time period of creation or origin of works and expressions.

Discussion of paper no. 2014-DP05: The British Library proposes to add the date of establishment and termination of a corporate body in the 046 MARC field.

There was also a very lively discussion about paper no. 2014-DP06 which suggests using field 037 to record and identify the various vendors of a particular electronic resource's title. There was no consensus on this document because many MAC Members felt that this was not a cataloging issue, but rather a matter of acquisitions administration, and therefore inappropriate for consideration by the MARC Advisory Committee.

ALA Subject Analysis Committee (SAC) – Suzanne Graham

Suzanne reported that the SAC Subgroup for Music Genre terms completed the creation of the music genre/form vocabulary, while the SAC subgroups for religion, literature and general terms are finalizing their work. The Genre/Form Implementation subcommittee for SAC plans to compile a document for best practices. The Library of Congress Medium of Performance Thesaurus for Music (LCMPT) was released in February 2014.

SAC has proposed the use of the field 751 in bibliographic records for place of origin of the genre /form terms stored in the 655 field, but MAC approved the 370 (in both bibliographic and authority records) for this data.

OCLC continues the project to populate bibliographic records with Faceted Application of Subject Terminology (FAST) headings.

An update of Cataloger's Desktop is expected in early fall.

Geographic Subject Headings updates: Malaysia was one of the five exceptions of federal geographic areas in which a constituent geographic entity did not need to be qualified, but "Malaysia" will soon need to be used as a geographical hierarchical qualifier. The Library of Congress (LC) is working with UC San Diego to update the authority records. Also, Cape Verde is now Cabo Verde, and South Australia can be abbreviated as S.A.

Lia Contursi is the new AALL representative liaison to SAC for July 2014-July 2017.

ALA Committee on Cataloging: Description & Access (CC:DA) – John Hostage

John announced that he has finished his second and final term as AALL Representative to CC:DA. Robert Bratton will serve as his successor from July 2014 to July 2017. John reported that AALL's Resource Description and Access (RDA) instruction revision proposal on access points for treaties has been accepted and implemented by the Joint Steering Committee (JSC) and was incorporated into the RDA Toolkit in April 2014. He also announced that some AALL law catalogers will begin to work on a proposal to eliminate the conventional collective title "Laws, etc." from the RDA instructions.

Robert Bratton gave his insights about his experience with the BIBFRAME Testbed. Many committee members attending the meeting expressed a strong interest in learning more about the developments of the BIBFRAME project as it is being developed under the leadership of the Library of Congress. Robert suggested that he could prepare a presentation on BIBFRAME for AALL 2015. Jean Pajerek also expressed her strong interest in developing a program on BIBFRAME for next year. The entire audience was very enthusiastic about it.

Classification and Subject Cataloging Advisory Working Group (CSCAG)–Yael Mandelstam

Yael reported that the proposed use of 751 for jurisdictions associated with the genre terms stored in the 655 field was rejected by CSCAG. The group has started to work on a law genre/form best practices document, which will eventually be incorporated into the Library of Congress Genre/Form Headings Manual. The group will continue to work on strategies to implement law genre retrospectively. [More details in the CSCAG Report posted on the CSCAG web page: <http://www.aallnet.org/sections/ts/committees/Cataloging/Working-Groups/Classification/Annual-Reports/2013-2014.html>.]

Vendor-Supplied Records Advisory Working Group (VRAG) – Angela Jones

Angela reported that one of the most important projects of the group this year has been the preparation of the Task Force on Vendor-Supplied Bibliographic Records Creation and Distribution Model report. This document proposes and strongly recommends that the vendors of electronic resources provide MARC records with their products. Communications and discussions with all the parties involved will continue. [More details in the VRAG Report posted on the VRAG web page: <http://www.aallnet.org/sections/ts/committees/Cataloging/Working-Groups/Vendor-Supplied-Records/Annual-Reports/2013-2014.html>.]

Descriptive Cataloging Advisory Working Group (DCAG) – Melissa Beck

Melissa explained that she is the outgoing chair of DCAG. She announced that George Prager will be the incoming chair.

One of the major concerns of this group in the coming year will be the ongoing review of the special *Resource Description and Access (RDA)* instructions that apply to law cataloging. The group intends to propose more changes for instructions that do not function well for the descriptive cataloging of law materials. At the same time, the group will start some discussion on appropriate *RDA* best practices for law. [More details in the DCAG Report posted on the DCAG web page: <http://www.aallnet.org/sections/ts/committees/Cataloging/Working-Groups/Descriptive-Cataloging/Annual-Reports/2013-2014.html>.]

Jolande Goldberg, LC Liaison to TS-SIS: Library of Congress

Jolande gave an introduction on her newly designed KIA-KIX Class Schedule on the Indigenous People of the Americas. Her detailed report is appended in the minutes posted on the webpage of the Cataloging and Classification Standing Committee.

Jackie Magagnosc and Ellen McGrath proposed to start a reporting routine at AALL, specifically to inform our community on any updates issued by the Program of Cooperative Cataloging (PCC). After some discussion, we came to the conclusion that the best way to keep abreast with all the developments established by PCC is to continue to forward news items to the Cataloging and Classification Standing Committee list as they become available.

The meeting was adjourned at 8:15 a.m.

Respectfully submitted by Lia Contursi.

OCLC Update and Roundtable

*Jacqueline Magagnosc
Cornell University*

The Online Bibliographic Services Special Interest Group (OBS-SIS) OCLC Users Group met on Monday, July 14, 2014 from 11:45 a.m. to 12:45 p.m. Glenn Patton presented cataloging news, including an update on the Faceted Application of Subject Terminology (FAST) headings project, and information about updates to WorldCat Discovery and many other OCLC WorldShare products. Copies of the current *What's New at OCLC* brochure were available for the audience and are available via the OCLC website at: http://www.oclc.org/content/dam/oclc/services/brochures/215191usb_whats_new_at_oclc.pdf.

Glenn Patton's PowerPoint Slides are available via the OBS website at <http://www.aallnet.org/sections/obs/documents/reports/OCLC-Update-2014.pdf>.

Cataloging news

Connexion client version 2.51 is now available; version 2.40 will no longer be supported. All users must update to version 2.50 or 2.51 by July 31, 2014. OCLC staff will send reminders in advance of the deadline.

In May 2014, OCLC made changes to the online bibliographic save file. Records are no longer automatically deleted, but rather they will remain in the file until the user deletes them. Record locks do continue to expire after 14 days. This change does not apply to the authority record online save file.

MARC format changes applied in early May covered most of MARC update 16 as issued by the Library of Congress. See *OCLC Technical Bulletin 263* for details. MARC updates 17 and 18 are expected later this year; OCLC currently plans to apply them in early August. Details will be announced in *Technical Bulletin 264*.

Glenn provided an update on changes to controlling headings. Since 2012, OCLC has been processing newly added and replaced master records, programmatically replacing controlled information in headings. Currently, almost 62 million records have at least one controlled heading. In early June 2014, OCLC started retrospective conversion of records using this process, which should result in a dramatic increase in the number of controlled headings. OCLC is also investigating the use of authority files other than the Library of Congress Name Authority File (LCNAF) and Library of Congress Subject Headings (LCSH) to control records.

In early June 2014, changes were made to the functionality of the OCLC controlling software. The biggest change was the software discontinuing use of Library of Congress validation records as part of the controlling process. OCLC staff discovered that there were problems in headings where a subdivision could be either \$x or \$v, resulting in headings being

controlled incorrectly, so the decision was made to exclude validation records from the process. Additionally, the headings control process is no longer evaluating records marked as containing “series like phrases.” Automatic controlling is blocked if a heading matches a 4XX field that is an unqualified personal name; automatic controlling of these headings sometimes caused them to be controlled to the wrong record.

Authority file conversion

Phases 1 and 2 of the *Resource Description and Access (RDA)* implementation conversion of authority records have been completed, and many of the records marked “667 THIS 1XX FIELD CANNOT BE USED UNDER RDA UNTIL THIS RECORD HAS BEEN REVIEWED AND/OR UPDATED” have been evaluated and updated. In phase 2, many headings were changed through machine manipulation of data elements, particularly dates. This included spelling out months in treaty headings. In the planned phase 3, about 7.5 million records will be recoded as valid RDA headings under the presumption that if there is no 667 note, the record is okay. How to execute this and whether to do some machine manipulation as part of the process is still under discussion, particularly amongst the Name Authority Cooperative Program (NACO) nodes.

Hybrid records and the General Material Designation (GMD)

OCLC plans to add 33X fields to non-*RDA* records, along with additional updates such as spelling out appropriate abbreviations and updating headings to *RDA* forms in non-*RDA* records. This policy is detailed in OCLC’s *RDA* policy issued one and a half years ago (<http://www.oclc.org/en-US/rda/new-policy.html>). We should expect to see more of this type of conversion in the future. Emphasis is being placed on 33X fields because integrated library systems can use these controlled vocabularies in their indexing processes instead of making assumptions based on coding in records, such as distinguishing between regular DVDs and Blu-ray discs. These developments are designed to facilitate public interfaces, making more use of faceted data.

Non-*RDA* records will retain GMDs until at least March 2016. Glenn mentioned as a side note that, historically, GMDs came from the International Standard Bibliographic Description (ISBD). However, they are no longer in the ISBD and have been replaced with elements similar to MARC 3XX fields.

Faceted Application of Subject Terminology (FAST headings)

FAST is a joint project between OCLC Research and the Library of Congress. FAST converts LCSH into a more faceted set of terms, which are compatible with a linked data environment. There are eight facet categories in the system: chronological, corporate names, events, form/genre, geographic names, personal names, titles, and topics. FAST takes a string of characters and breaks it apart into separate fields. Using FAST, a user can record what is needed without the massive instruction associated with constructing LCSH. Additionally, FAST supports faceted navigation, a feature increasingly part of public interfaces. OCLC began using an automated process to add FAST headings to master records almost a year ago. FAST headings are being applied only to English language cataloging records with LCSH. Records with FAST headings have a 040 \$d OCLCF symbol, as well as other indications, such as 6XX fields with second indicator 7, \$2 fast, and \$0 with a FAST identifier.

Users can download the entire FAST file and it can be used in systems like Summon as a supplementary file. There is currently no capability to download single records, but this is probably coming in a newer cataloging interface. Attribution is only required if you use the bulk file download, not if you have the headings in your records.

WorldCat Discovery Services

WorldCat Discovery Services is OCLC’s new reference and discovery system designed to replace FirstSearch and WorldCat Local. The initial version of this product became available to any library with a FirstSearch subscription in March 2014. WorldCat Local and WorldShare Management Services (WMS) are migrating to WorldCat Discovery Services. Staff mode, which provides more detailed searching capabilities, became available at the end of June 2014. More information and functionality will be available in coming months.

What are the benefits of this change? Current FirstSearch customers will gain access to a “central index” of 200 million article-level citations and over a billion citations to e-books and other e-content. The service features an adaptive user interface and custom branding. If you have current holdings in WorldCat and use the WorldCat knowledge base, the interface ensures that your user sees your holdings first. Link resolution to full-text materials is part of the service and subscribers get the capability for a built-in A-Z list, plus options to add various features such as real-time availability, course reserves, remote database searching, and custom reporting via Adobe® Reports & Analytics. The goals of this product are more visibility for library collections and direct links to access full-text material more quickly.

Libraries with an Interlibrary Loan (ILL) subscription can get a full range of fulfillment options using the WorldCat knowledge base or other open-URL resolver to link directly to full-text documents. Built-in user-initiated ILL functionality is available along with other automatic functions, such as deferred requests for owned items and direct links to your catalog to check availability. It is also possible to set up links to purchase directly from content providers. WorldCat Discovery Services features a responsive user interface for different devices, optimizing the display for the screen size.

In order to get ready for WorldCat Discovery Services, libraries should:

- Make sure information about linking to their catalogs and IP addresses are accurately recorded in the WorldCat Registry;
- Make sure WorldCat holdings are up-to-date; and,
- Request access to the WorldCat knowledge base and use it to create records for e-collections.

“Getting ready for WorldCat Discovery” webinars are available on a regular basis. See <http://oclc.org/getreadywebinars> for a schedule of upcoming sessions and links to recorded presentations. You can register to get updates at <http://www.oclc.org/en-US/email.html>.

WorldShare Metadata

OCLC is gradually shifting to a new interface and a new suite of services related to metadata management. These services are located in WorldShare Metadata under “Manage Records” and “Manage Collections.”

“Manage Records” is a new interface which is gradually integrating the following functionality:

- Creating and replacing master records using either a MARC21 or Text View editor;
- Setting and deleting WorldCat holdings;
- Management of local holdings records (LHR) and local bibliographic data (LBD);
- Saving in-progress records for later use;
- Searching and displaying Library of Congress authority records;
- Incorporating FAST headings; and,
- Exporting bibliographic records via TCP/IP connection to local systems.

OCLC plans to continue adding new functionality. **There is currently no end of life planned for the Connexion client;** the record manager needs more functionality before the phasing out Connexion can be considered.

Increasingly, libraries are managing groups of records associated with e-book and e-journal collections. WorldShare Metadata’s “Manage Collections” option is designed to streamline workflows for these types of collections. Once a library registers e-collections in the knowledge base, you can arrange for automatic delivery of MARC records and maintenance of WorldCat holdings for these collections, keeping bibliographic data and access URLs up to date. The WorldCat knowledge base currently represents content from many providers, including EBSCO, Springer, Informa Taylor & Francis, and Wiley. Collections are based on library holdings, and customized collections can be created. OCLC also offers the GovDoc service, which uses a library’s Federal Depository Library Program profile and GPO records to maintain its government document collection.

The WorldCat knowledge base is continually evolving. At initial implementation, information about the content of a collection comes from the provider. It became obvious that libraries were making changes, for example, when the availability of a publication differed from what the publisher reported. Beginning in March 2014, OCLC implemented a process allowing libraries holding a collection to check the contents of the collection before changes were made in the knowledge base, representing a cooperative way of maintaining collection information. Member libraries approve or deny changes before they are made. In phase 2, knowledge base users became able to make changes to existing knowledge base records, and then redistribute the changes to the community. In the next phase, members will be able to add new titles to existing collections and create new collections to share with the community.

OCLC suggests that there are many reasons to register electronic collections in the WorldCat knowledge base, including automatic management of holdings, open-URL resolution, easy access to electronic journals, quick and easy sharing of electronic content, and other facets of electronic resource management such as budgets and licenses.

WorldCat Collection Sets is migrating to a combination of the WorldCat knowledge base and WorldShare Metadata. WorldShare Collection Manager should provide a structure for distribution of records for both finite and growing sets and for creation of new collections for distribution. It will also eventually add records for the Law Library Microform Consortium (LLMC). Watch for announcements, probably coming in September or October.

It should be noted that this suite of services is available as part of your library's cataloging subscription. The per-record charge for WorldCat collections is a thing of the past.

OCLC WorldCat Metadata API

The OCLC WorldCat Metadata Application Programming Interface (API) for WorldCat data is now available. All of the functions that are normally the basis of cataloging activity are now available as APIs. Terry Reese used the API to integrate his widely used MarcEdit program with OCLC.

FirstSearch end of life

The end-date for FirstSearch will be in 2015, most likely towards the end of the year.

OCLC involvement in BibFrame

OCLC has released significant portions of the WorldCat database as linked-data using Schema.org and has worked with the Schema.org partners to add library-related extensions to the data structure. It is vitally important to get libraries out into the linked-data community and communicate the idea and importance of library-curated information to the broader internet community. Glenn shared his personal concern that development of BibFrame with such a strong focus on the library community will result in another information/format silo similar to MARC.

Preservation Standing Committee 2014 Annual Meeting Minutes San Antonio, TX

MINUTES

Attendees: Maxine Wright (Chair), Adrienne Dewitt, Wilhelmina Randtke, Marie Concannon, Michelle Gorospe, Travis H. Williams, Fang Wang, Mary Alice Baisch

Meeting called to order at 5:33 p.m.

Welcome

Passing the gavel; Lauren Seney was unable to attend this year's conference. Therefore, Maxine Wright stepped into her new role a little earlier than usual. Incoming Chair Maxine Wright provided the group with some information about her background and interest in preservation. Maxine Wright volunteered to take the minutes.

Brief History of the Committee

Charge – reviewed with the group our mission and duties.

30th Anniversary – Maxine talked about ways the committee can celebrate 30 years of service. In the interim, she will reach out to Pat Turpening to gather additional history on the committee.

Successes – Maxine asked members if they were aware of the following: staff awareness guide, preservation on the cheap, tips and tricks, worst book contest, links to digital resources, tip of the month, revision of American Association of Law Libraries (AALL) Preservation Policy, involvement with program proposals, or noticed our increased presence at the TS activities table.

Introductions

Members shared their connections to preservation and details about preservation activities/projects in which they are involved.

Challenges

Membership – help us find passionate and active members to join the committee.

Appeal to larger TS section – Maxine talked about finding ways to appeal to more than 590 TS members who are not part of the preservation committee. Members made several suggestions which will be explored in the coming months.

Programming – members suggested practical hands-on workshops; guest lecturers to talk about digitization from various backgrounds (academic, law firms, and public law library); live debate on issues surrounding print versus digital preservation.

Survey – Maxine asked everyone to rate the preservation committee, preservation page, and preservation column. The answers were very interesting and will serve as a springboard for issues to address in the coming months.

Goals for 2014-2016

Brainstorm – members were asked to share ideas for 2015 programming.

Open Comments

Maxine asked everyone to share anything they want about preservation. Members talked about the federal government plans for digitization, Legal Information Preservation Alliance's (LIPA) affiliation with AALL, building repositories, the cost of storage space, finding an expert in digital preservation to serve as a liaison, and the findings of the Digital Library Initiatives Special Committee.

Closing Remarks

Thank you for your coming; there was a lot of synergy in the room.

Will you join us? If you want more information: contact Maxine Wright at mw960@law.georgetown.edu.

The meeting adjourned at 6:40 p.m.

*Submitted by
Maxine Wright
Georgetown University*

Preservation Activities in San Antonio

*Maxine Wright
Georgetown University*

A nice flow of members stopped by the Technical Services (TS) Activities Table in San Antonio. The Preservation Committee had two attractions: (1) images of the worst book contest; and (2) the preservation scrambler. Some members tried voraciously to unscramble the words, but unfortunately, we did not have any winners this year. I returned home with two pockets full of Subway gift cards.

The Preservation Committee meeting went very well; we had good attendance and lots of synergy. We would have had more attendees, but several other standing committee meetings were scheduled during the same time slot.

However, it was nice that members stopped by for a few minutes to let me know they were interested but had scheduling conflicts. Perhaps next year, standing committee meetings will be scheduled differently, allowing members wiggle room to attend more than one special interest section meeting.

Worst Book Contest Winner

I'm happy to report William A. Wise Law Library put their \$150.00 preservation prize money to great use. They purchased three water sensing alarms, batteries, a thermometer/hygrometer, several boxes of water resistant sleeves to hold archival materials for their rare book room, and archival document repair tape. That is money well spent, right?

Preservation Committee Members: 2014-2015

Here is the new roster of Preservation Committee members for 2014-2015. We are going to have a great year.

Lauren Seney is the Digital Initiatives Librarian at the College of William & Mary Wolf Law Library where she has been managing the Scholarship Repository for the last four-and-a-half years. Her interest in preservation stems from her work digitizing physical materials and collecting born-digital materials related to the law school's history. These tasks involve the care and conservation of the physical originals, as well as a commitment to implement current best practices for the preservation of digital materials. As the immediate past chair of the Preservation Committee, she is also responsible for distributing the Preservation Tip of the Month.

Carolyn Cox is the Digital Collections Librarian at Georgetown Law Library. She oversees the Chesapeake Digital Preservation Group and manages digital preservation projects and institutional repositories. During her library career she has worked as a systems administrator for library management systems at both Santa Ana College and the United States

Institute for Peace (USIP). Since coming to Georgetown in 2011, she held the position of digital collections assistant before moving into her role as Digital Collections Librarian this year. Prior to her library career, she spent many years working as a systems programmer. Carolyn received her Master's in Library and Information Science from San Jose State University in 2013, with an emphasis on digital preservation and management. She also holds a B.A.S. in System Analysis/Applications Development.

Adrienne Dewitt is the Collection Development Librarian at North Carolina Central University. Her interest in preservation comes from her family background. Her family was active in collecting and dealing in 19th and early 20th century antique dolls, toys, and ephemera. Her grandmother worked for Goodwill Industries in Indiana, where she valued donated antiques for sale at auction, and now her mother runs her own small business that sells vintage and antique dolls and other collectibles. Through her family, she learned how to care for and preserve ephemera and other print materials for collection and sale. She had the opportunity to use her life experience in helping preserve some of the library's important historical resources. This piqued her interest in collection preservation, particularly of 19th century monographs and early to mid-20th century court documents in print.

Saadia Iqbal is the Digital and Bibliographic Technologies Librarian at Texas Tech University. She is a graduate of the State University of New York (SUNY) at Buffalo where she received both her J.D. and M.L.S. She is interested in all aspects of preservation, but digital preservation is the area about which she feels most strongly.

Travis H. Williams is the Archivist and Metadata Librarian at the Louisiana State University (LSU) Law School, where he oversees the preservation and management of library's archival materials and rare books collection. He worked with a collection of oral histories while a graduate assistant at LSU's Hill Memorial Library and completed a cataloging internship in the archives at Louisiana Public Broadcasting. He is a member of the Society of American Archivists and the Louisiana Archives and Manuscripts Association. When not in the library, Travis is an active theater-performer, independent filmmaker, and cat owner.

Wilhelmina Randtke is the Electronic Resources Librarian at St. Mary's University School of Law. She works with both the information technology (IT) department and the law school, and she is responsible for technology-related tasks and web development. Previously, she worked as a lawyer for state government where she provided research to senior attorneys regarding federal audits and performed a variety of background tasks related to running a state agency, including human resources issues, public records requests, management of records systems, audits on grants, and procurement issues.

Liaisons to the Preservation Committee

We have two leaders in the industry who will serve as liaisons to the committee: Margie Maes, Executive Director of Legal Information Preservation Alliance, and Victoria K. Trotta, Chair of Law Library Mass Digitization Task Force and Associate Dean for Ross-Blakely Law Library. Lastly, Sally Wambold and Patricia Turpening, two long-standing members of the committee, will continue to serve as consultants.

Symposium on Link Rot – October 24, 2014

For all those interested in preserving web content, you may want to reserve your seat or tune-in online for an upcoming symposium, aptly titled "404/File Not Found: Link Rot Legal Citation and Projects to Preserve Precedent."

On October 24, 2014, Georgetown University Law Library in Washington, D.C. will host a symposium that explores the problem of link and reference rot. The program and panel of speakers makes this an event worth attending. TS-SIS Preservation Committee member Carolyn Cox is one of the speakers. Find out more at <http://www.law.georgetown.edu/library/404/>.

In the meantime, put your preservation cap on, and start preserving.

2015 Call for Proposals is Open – Submissions Due October 6, 2014

The call for Program and Workshop Proposals for AALL's 108th Annual Meeting and Conference in Philadelphia is now open. Members are invited to turn their great ideas into programs offering content that can be delivered in an energetic and engaging format. Use the online Program and Workshop Proposal Collection site to develop your proposal, share it with your colleagues, and submit it online by October 6. Don't forget to explore helpful resources in the Information for Program Proposers section of AALLNET.

Due to a time conflict with the Technical Services Special Interest Section (TS-SIS) Business Meeting, attendance at this year's roundtable was low. However, despite our few numbers, a range of libraries from across the country were represented along with a bookseller. After introductions, we jumped right into our first topic: how to label manuscripts in a catalog record. Various methods using call numbers, symbols, and 500:5 notes were compared. As manuscripts are by their nature unique, the discussion then turned to printed books which were likewise unique. Examples include interleaved books (wherein the printed book has been rebound with blank pages interleaved for an owner to write notes), books with extensive handwritten marginalia, and books with extensive manuscript endnotes. The attendees all agreed that such books cannot be termed "manuscripts," but that they were still worthy of some notation in the catalog record. Yale Law Library uses a standard phrase in the notes field which can be searched. As Yale's catalog also allows "reviews" of books to be attached to the record, the book dealer's description of the marginalia is often included there. The Robbins Collection at Berkeley Law School uses the term "marginalia" in the notes field of these items. They also maintain a print clippings file which includes scholarship and descriptions of various manuscripts, as well as printed books with significant marginalia.

The second topic under discussion this year was whether and how to indicate that a collection of books in a library's holdings formerly belonged to a well-known jurist. The University of Minnesota Law Library uses a standard statement in the notes field of each item. The Robbins Collection likewise uses an attribution note, but also creates a 710 author field for the previous owner in order to link the collection items. Both Yale and the Law Library at Louisiana State University, Baton Rouge, shelve these collections together and create either a new location or a new Hicks call number class for the collection (*i.e.* "Tucker-rare" or "Taussig"). At Columbia Law Library, collections are shelved together; if they are held in the Special Collections then, like Yale, a new Hicks call number class is devised. If they are held in the general collection, then a sub-location is assigned, e.g., "Cardozo collection." A sub-location cannot be searched via the public catalog, but a list of items in the collection can be created by staff.

A new committee, under the umbrella of the Legal History & Rare Books Special Interest Section (LHRB-SIS), will oversee this roundtable. If you're interested in participating and/or have ideas about what we should discuss next year, please volunteer through "My Communities"! If you're not a member of LHRB-SIS, you may contact the chair of the committee, Susan Karpuk at susan.karpuk@yale.edu.

**Report of the AALL Representative to the American Library Association (ALA),
Association for Library Collections and Technical Services, Cataloging and Metadata Management
Section, Committee on Cataloging: Description and Access (CC:DA)
ALA Midwinter Meeting, Philadelphia, January 2014
ALA Annual Conference, Las Vegas, Nevada, June 2014**

30 July 2014

Liaison name: John Hostage

Liaison organization: ALA Committee on Cataloging: Description and Access (CC:DA)

Primary contact: Peter Rolla, chair

The work of CC:DA continued to be focused on *Resource Description & Access (RDA)* in the past year. The revision proposal that I prepared last year concerning access points for treaties was considered by the Joint Steering Committee for Revision of *RDA (JSC)*. I traveled to Washington, D.C., in November 2013 to be available when the proposal was discussed at the JSC meeting. It was important to be able to explain some of the legal details and the needs of law libraries. Even after the proposal was accepted, there was still extensive consultation with the American Association of Law Libraries (AALL) representative while the text was prepared for publication in the RDA Toolkit. This finally became a reality in April 2014. The entire process seems to have brought increased respect for AALL in the cataloging community.

The CC:DA task force on place names that I was serving on has been reconstituted as an international working group reporting directly to the JSC. I continue to serve on this working group, which will try to internationalize and simplify the rules.

Law catalogers in AALL continue to examine ways in which to improve *RDA*. In the coming year, we will be considering a proposal to eliminate the conventional collective title (uniform title) "Laws, etc." from the cataloging rules.

In this and other efforts, AALL will be represented by the new representative to CC:DA, Robert Bratton. I am grateful to have had the opportunity to serve AALL as representative for the last six years.

OBS-SIS/TS-SIS Joint Research Grant Committee 2013-2014 Annual Report

*Kerry Skinner
Ross-Blakley Law Library, Sandra Day
O'Connor College of Law*

This year, the committee updated the grant information on the Online Bibliographic Services (OBS) and Technical Services (TS) websites and the American Association of Law Libraries (AALL) Communities page with new committee information, and we fixed all of the broken links left from the OBS webpage revision the year before. We then advertised the grant with a single deadline in May.

Unfortunately, we again did not have any applicants.

It has been 10 years since there was an applicant for the grant. The committee met on March 19, 2014, to discuss the lack of applications for the grant. The committee then decided it may be time to revisit the grant guidelines and structure in light of the changing work realities of technical services librarians.

The committee drafted a proposal asking the OBS and TS Executive Boards to grant permission to begin looking at revamping the grant. We then met a second time to discuss the proposal, the upcoming survey, and plans for the next year.

The committee solicited feedback from the members about why no one is applying for the grant by creating and disseminating a survey from June 19 to June 27, 2014. The survey was successful with 120 respondents.

The Committee forwarded the Proposal to Revamp the Grant and a Summary of Survey Results to the OBS and TS Executive Boards for their review.

The AALL OBS-SIS and TS-SIS Joint Research Grant Committee is now accepting applications for the 2014/2015 Grant!

The purpose of the Online Bibliographic Services (OBS) and Technical Services (TS) Special Interest Sections' Joint Research Grant is to provide support to American Association of Law Libraries (AALL) members conducting research specific to technical services law librarianship that will enhance law librarianship service to our clients.

Qualifications: AALL membership is required. Preference will be given to applicants who are members of the OBS-SIS and/or TS-SIS at the time of application. Evidence that the research and publication will directly or indirectly benefit technical services law librarianship must be shown.

Grant Awards: The Joint Research Grant Committee (JRGC) awards grants in a single year ranging in amount of no more than \$1,000 at the discretion of JRGC. The grant amount each year requires approval by the OBS and TS Executive Boards.

Deadlines: Complete applications are due to the JRGC Chair **no later than October 15, 2014**. Grant recipients will be announced at the annual AALL meeting. Award amounts will be mailed to successful grant recipients as soon as final approval is received by the JRGC Chair.

For more information on the grant and the application process, please visit: <http://www.aallnet.org/sections/obs/committees/joint-research-grant-committee>.

If you have any further questions, please email the JRGC Chair, Kerry Skinner at Kerry.Skinner@asu.edu.

**MARC Advisory Committee (MAC) report from
American Library Association (ALA)
Annual Meeting
June 28-29, 2014, Las Vegas, Nevada**

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

MARC proposal no. 2014-04

Adding Miscellaneous Information in Topical Term and Geographic Name Fields of the MARC 21 Bibliographic and Authority Formats.

Proposed by the German National Library.

This paper proposes a method to designate miscellaneous information in topical term and geographic name fields in order to meet the German National Library's need for distinguishing the originating authority file for the term; there were originally four authority files used in German-speaking countries which have now been combined. The four authority files used different subfields, and some MARC subfields weren't good matches for the German libraries' needs. Some of the information in #g is used to distinguish headings with the same name, much like the use of parenthetical qualifiers in the Library of Congress Authority File (LCAF). In addition, subfield #g Miscellaneous information has been made repeatable in fields where it is already defined. Libraries that follow LCAF will not be affected by this decision.

MAC approved the proposal unanimously, with the caution that the definition of #g should be clearly written to avoid misuse of the parenthetical qualifier.

MARC proposal no. 2014-05

Designation Relationships Between Subject Headings from Different Thesauri in the MARC 20 Authority Format.

Proposed by the German National Library.

This paper proposes a method to designate relationships between entries from different thesauri in MARC authority records. In German, there is a tradition of mapping different thesauri to each other using the 7XX field with repeatable #i "Relationship Information" and repeatable #4 "Relationship code" and defining a list of relator codes and terms for the six types of ISO relationships: EQ (Equal), ~EQ (inexact equivalence), BM (Broader Mapping), NM (Narrower Mapping) and RM (Related Mapping). The #i could also be used in future authority files and maybe with genre/form terms. Libraries that follow LCAF will not be affected by this decision.

The proposal passed unanimously.

MARC proposal no. 2014-06

Defining New Field 388 for Time Period of Creation Terms in the MARC 21 Authority and Bibliographic Records.

Proposed by the Association for Library Collections & Technical Services (ALCTS) Subject Analysis Subcommittee on Genre/Form Implementation.

This proposal addressed the need for a place to record the time period of creation or origin of works and expressions. Currently, this is indicated in different ways: subject headings (Law, Medieval) or chronological subdivisions (#y). With Genre/Form implementation, this information will no longer be in the subject headings for literature or music. This chronological information would indicate either the date or time period of the creation of individual work/expression. (E.g., Beowulf was written in the Anglo-Saxon period of English history, and the 388 might be "Anglo-Saxon period, while a currently issued CD of violin concertos of the 18th-19th centuries might have a 388 of \$a18th century \$a19th century.") The proposed MARC field 648 was originally included in this proposal, but MAC felt that it should be discussed separately. There was discussion of the source of the chronological terms (probably Library of Congress Subject Headings (LCSH) for the libraries that already use it) and who would update it, but that is not in the scope of the proposal. Best practices would need to be developed. This will affect law catalogers with historical materials, such as ancient Greek or Roman law.

The new MARC field, 388—Time Period of Creation (R) would have the following indicators:

First Indicator—*Type of time period*

#--No information provided

1—Creation

2—Creation of aggregation

Second indicator—*Undefined*

#--Undefined

Subfield codes

\$a—Time period of creation term (R)

\$0—Authority record control number or standard number (R)

\$2—Source of term (NR)

\$3—Materials specified (NR)

\$6—Linkage (NR)

\$8—Field link and sequence number (R)

MAC approved the proposal as edited to remove discussion of the 648 field.

MARC discussion paper no. 2-14-DP05

Adding Dates for Corporate Bodies in Field 046 in the MARC 21 Authority Format.

Proposed by the British Library.

This proposal considers options for recording the date of establishment and date of termination of a corporate body. It states that as MARC is currently written, it is unclear what subfield to use for this information. Some catalogers use \$f (Birth date) and \$g (Death date), while others use \$s (Start period) and \$t (End period).

Option 1

Define new subfields \$q (Date of establishment) and \$4 (Date of termination) of a corporate body; \$s/\$t would be used for the start and termination of a period of activity for both persons and corporations.

Option 2

Broaden the definition of subfields \$f and \$g to include dates of establishment and termination of corporations, and leave the scope of \$s/\$t as the dates of a period of activity. [Personal comments—what about mergers and acquisitions of corporate bodies? What about companies that were restarted?]

Option 1 was clearly the majority preference among MAC members, who agreed that the definition and scope of field 046 should be expanded to include corporate bodies and that the definitions for \$s and \$t should be redefined to make them clearer. This will probably appear as a proposal at ALA Midwinter Meeting in 2015.

MARC discussion paper no. 2014-DP06

Defining Values for Indicator 1 in Field 037 in the MARC 21 Bibliographic Format.

Proposed by the British Library.

The British Library needs a way to track the different electronic material vendors and what contents were received from the vendors. It is proposing to use the 037 (Source of Acquisition) field to do this. They would like to define indicator 1 to allow it to carry this information relating to the source of acquisition of materials and that it be sequential—similar to the 264 field. This field would indicate the source of materials (production, publisher, distribution, manufacture and copyright notice) and the range of issues for each acquisition source.

There was a lot of discussion about the need for this field, as many committee members felt that this was acquisitions information, probably unique to each library, and not suitable information to include in the Master record. If many libraries added this information, how many 037 fields would an OCLC record include? Would the limited information one library added be seen as complete availability information and seem to favor some vendors at the cost of others if a library changed vendors and the 037 was misinterpreted to mean that a vendor no longer supplied the title? Who really uses the 037? Many members agreed that the acquisitions information used in their libraries did not come from the OCLC record, but from licensing agreements, electronic material purchases and local preferences. The old use of the 037 was for technical reports that were not available from the publisher, but only from the agency that produced the report. This is not the case with electronic materials that are much easier to locate. The suggestion that adding the \$5 to the 037 to indicate the library was accepted after much discussion. There was also a lot of discussion about the definitions of the indicators proposed, particularly using # as Not applicable/No information provided/Earliest because it has too many meanings and there is no way to tell which one is meant. “Earliest” is particularly difficult because it could mean the earliest issues of the title are available from this vendor OR the earliest issues the library has are available from this vendor. There is no way to tell how thorough the library researched the availability of the title before adding the 037. Where do catalogers get this information anyway? Most of us do not work with acquisitions information and have enough to do without adding this effort to our work.

The discussion was finally tabled to be continued at the second meeting, which was much shorter and did decide on the questions asked in the discussion paper (and avoided most of the questions about the appropriateness of the information

in the MARC record). It was decided that: (1) the definition of values for indicator 1 of the 037b field were an acceptable means of recording sequential source of acquisitions information; (2) the indicator definitions for the first indicator in the 264 could be used for the first indicator in the 037 if the \$3 and \$* were added; and (3) there are no alternative methods necessary, we could locally decide to use the 037, ignore it, or delete it as we pleased. This will come back as a proposal, perhaps at ALA Midwinter in January 2015.

Marla Schwartz Grant Report

Michelle Modic

This summer, I was awarded the wonderful opportunity to attend the 2014 American Association of Law Libraries (AALL) Annual Meeting in San Antonio thanks to the generous members of the Technical Services Special Interest Session (TS-SIS) and the Marla Schwartz Grant. I am very thankful to everyone for helping me attend this conference. It is therefore my honor to write this brief report for the *Technical Services Law Librarian (TSLL)* on my experiences in San Antonio.

One of the reasons I was excited to go to the AALL Annual Meeting was that I'd never been to San Antonio before. The hotels and the conference center were perched right on top of the River Walk itself, making it very easy to wander down to the river and explore. Some parts of the River Walk were incredibly festive, filled with restaurants and families and groups of people out enjoying themselves. Other parts were much quieter, but offered a unique glimpse of some of the interesting architecture and older buildings that run along the river. My favorite moment of exploration actually occurred just off the River Walk itself. We saw signs for a cathedral and followed them up to street level. There, on a wide-open plaza with the sun beginning to set, was the San Fernando Cathedral. I felt as though I'd been transported to Europe, or even back in time. It was definitely very much worth the walk to see it, even with the heat.

Another fun event was the Thomson Reuters and AALL Member Appreciation Event on Monday evening. The party was held at a ranch, but it was far more than a simple barbeque. A number of tame longhorn bulls awaited us as we stepped off the buses, and everyone got a chance to touch them and take pictures. We were eventually herded down to a rodeo set-up, where we watched a group of young girls compete in multiple rodeo events. Once it was over, all the lights turned off and it was pitch-black dark. Then they came: fireworks. They were amazing, and I spent the rest of the evening with a smile on my face.

There was more to this conference than sight-seeing of course! I was also able to attend numerous interesting educational talks, panels, and presentations. One of my favorites took place earlier on Monday, and it discussed how to handle link rot and dead links. Having combed through numerous pages of our website for dead links as an intern, I was interested to learn more about different ways to handle them. I learned that there are a number of different programs that can check for dead links on websites, and that there are even checkers that can be run in an Integrated Library System (ILS)! I found the latter especially exciting, because I somehow hadn't imagined that such a thing could exist. I hope to bring what I learned to my job and use this information to both help streamline workflows and prevent our patrons from being blocked by dead links. This panel in particular sticks out to me because I was actually disappointed when it ended and wanted to learn more.

It was far from the only interesting panel I attended however, and I am really glad I was able to learn as much as I did while I was there. Another helpful panel discussed copyright and how it applies to digital books. I learned about first sale versus license agreements, as well as the four factors used to determine fair use. Given how much of our libraries' collections are now comprised of digital books, I made this panel a priority for myself. Issues of digital copyright will be among the most frequently contested issues libraries will have to deal with in the future, so I knew that educating myself further would be important.

Finally, there was what is probably the most important part of any conference: meeting people. I was lucky to be introduced to a number of interesting people by a former colleague of mine, and am thankful to those people for taking the time to talk to me and get to know me a little bit. I also met a number of people by attending smaller roundtables and coffee talks, and was happy to find so many like-minded people to converse with. I learned just as much from these conversations as I did from the educational programming. By the end of the conference, I was exhausted, but I was also really happy. I genuinely feel like I'll be better equipped to do my job and function as a professional after this, and I had a good time while I was at it. So thank you again to TS-SIS for awarding me the 2014 Marla Schwartz Grant and allowing me to have this opportunity—I did my best to appreciate it to the fullest.

**2013-2014 Annual Report of American Association
of Law Libraries Liaison to Subject Analysis
Committee (SAC)**

Suzanne Graham
University of Georgia

Genre/Form Headings: SAC continues to work through the creation of genre/form terms with constituent groups. Lists of music, religion, and literature terms are currently in process with drafts anticipated early next year.

Yael Mandelstam chairs the subgroup compiling and organizing general genre/form terms with overarching or non-specific fields. It has compiled a preliminary list of general genre/form terms. Approved terms might be available for use this Fall.

The law community completed its initial list of terms in 2011, but additional terms and modifications are encouraged. These may be submitted through the Subject Authority Cooperative Program (SACO) Law Funnel or directly to Library of Congress (LC) via Minaret by SACO members.

The Genre/Form Implementation subcommittee of SAC hopes to compile a best practices document similar to the Subject Cataloging Manual (SCM) to assist in genre/form assignment.

Library of Congress Medium of Performance Thesaurus for Music (LCMPT): In February 2014, the Library of Congress released the LCMPT, a project pursued cooperatively by SAC and the Music Library Association (MLA). This initial list has over 800 terms. MLA issued best practices guidance on using the terms in April 2014.

751 Field: SAC had proposed using the 751 field in bibliographic records to store the place/origin characteristics of genre/form terms that are being moved from 650s (which could be subdivided geographically) to 655s (which cannot). However, MAC has approved the 370 field for both bibliographic and authority records for this purpose.

Resource Description and Access (RDA) Implementation: The *RDA* Implementation subcommittee reworked and resubmitted a draft addressing subject analysis in *RDA* with specific language for the relevant chapters (particularly chapter 23). The committee forwarded the proposal to Kathy Glennan, American Library Association (ALA) representative to the *RDA* Joint Steering Committee, for consideration at the Steering Committee's November 2014 meeting.

OCLC's Faceted Application of Subject Terminology (FAST): OCLC continues to mass produce FAST headings in records based on Library of Congress Subject Headings (LCSH). OCLC does not expect libraries to update FAST headings if they become out-of-synch with current LCSH changes (and incorrect). OCLC is performing ongoing maintenance of these terms, but when we find errors we may remove the FAST field's subfield o to push these records back into the queue.

Software Headings: Software products belong in the name authority file, not in subject headings. Subclasses KIA-KIK, Law of Indigenous Peoples in North America, were adopted into ClassWeb on June 2, but these numbers are still subject to change without notice in monthly lists. LC will make an announcement when KIA-KIK and KF8200+ have been approved for use.

ClassWeb Interface: LC will release a new look and feel for ClassWeb in early Fall.

Geographic Heading Changes: Malaysia is no longer one of the special federations that require only city/country subdivisions (without intermediary states) in the name authority file and in geographic subdivisions. "Cabo Verde" replaces "Cape Verde," and South Australia is now represented as "S.A."

385/386 Fields: Janis Young, Library of Congress Policy Standards Division, continues to make progress outlining the creation of a new controlled vocabulary for demographic terms to be used in the 385 and 386 fields (Library of Congress Demographic Group Term and Code List, \$2 lcdgt). SAC still supports the creation of this vocabulary and will assist with the creation of the initial list if solicited.

"Library of Congress Medium of Performance Thesaurus for Music (LCMPT)" presentation by Hermine Vermeij, Casey Mullin, Nancy Lorimer, and Janis Young: Speakers provided a quick overview of the new performance thesaurus with a frank exchange of the challenges and fine granularity in which music catalogers routinely engage. Interesting questions were raised about expanding the scope of this thesaurus beyond music to include other performance mediums (e.g., dance, performance art, etc.).

First, I would like to thank the Technical Services Special Interest Section (TS-SIS) Awards Committee for providing me with an educational grant to attend my first American Association of Law Libraries (AALL) Annual Meeting. I was appointed as the Associate Editor of the *Technical Services Law Librarian (TSLL)* in March 2014, and this educational grant allowed me to attend the *TSLL* Editorial Board meeting as well as several technical services-oriented conference sessions to learn about timely issues and connect with people in the field.

The first conference session I attended was “A Dialog for Catalogers and Reference Librarians: Class K from Alpha to Omega.” Because Brian Striman was the moderator, it should come as no surprise that the session was lively and engaging. Jolande Goldberg, Tina Gheen, and Jennifer Gonzalez were the panelists, all from the Library of Congress. The first part of the session focused on Jolande “teaching” Brian about classification and the intricacies in the development of classes over time. The two general takeaway points for me were (1) that reclassification is an ongoing process (per Brian); and (2) that the “best classification does not relieve you from thinking” (per Jolande). Tina and Jennifer then introduced the new Indigenous Law Portal from the Library of Congress, which was very good news for me as I am currently in Oklahoma. From just the short preview we had of the portal, I can tell that it will be a very useful resource for my students and faculty, and I am excited to start exploring it more fully.

I also attended “Click and Go: Ensuring Smooth Access to Online Resources” on the topic of link rot. Suzanne Graham (University of Georgia), Julie Horst (U.S. Court of Appeals – 9th Circuit Library), and Keiko Okuhara (University of Hawaii) presented a very useful session that provided simple solutions for link rot, although it was pointed out that some issues are beyond the system manager’s control (e.g., incorrect citations and links to subscription databases that cannot be accessed). Three themes were discussed in the session: (1) the causes of common internet access errors; (2) low-cost resources for testing and repairing links (in both websites and catalogs) and for finding prior versions of webpages; and (3) ways to proactively prevent broken links. Popular link-checking resources include LinkChecker (and its various add-on forms), Xenu, URL Checker, and the broken link checkers built in to WordPress, Drupal, and LibGuides. The session concluded with an overview of two comprehensive projects designed to tackle link rot, Perma (<http://perma.cc/about>) and Archive-It (<http://www.archive-it.org/learn-more>).

I came away from these sessions with a deeper appreciation for the time and attention to detail required for many technical service functions. So when Eric W. Young, the assistant dean of Nova Southeastern University Law Library, stated at the “Deans and Directors Roundtable: Reinventing Law School Libraries for a Digital Age” that he would like to have 97-98% of their collection to be digital and essentially eliminate technical service positions, I was taken aback. Transitioning to a primarily digital collection only increases the need for technical service librarians, as you still need “thinking” to catalog and manage resources in an ever-changing online environment. My hope is that technical services will be revitalized as people begin to understand the vital role these librarians play in making digital resources accessible to all.

Program Report

Opening General Session/Keynote Address by Andrew Keen

Monica Espitia
Columbia Law Library

At the American Association of Law Libraries (AALL) 2014 Annual Meeting in San Antonio, keynote speaker Andrew Keen rigorously challenged the attendees to reassess and reinvent their roles in today’s revolutionary digital society. A first-generation Internet entrepreneur and founder of Audio Café, Keen continues to have a high-profile presence as a speaker, commentator, CNN columnist, and author published in 17 languages. His books include *The Cult of the Amateur: How Today’s Internet Is Killing Our Culture and Assaulting Our Economy* (2007) and *Digital Vertigo: How Today’s Online Social Revolution Is Dividing, Diminishing, and Disorienting Us* (2012).

The tone of the presentation seemed at first to contradict the conference theme, “Beyond Boundaries,” as Keen suggested that as old boundaries disappear with new technologies, new boundaries will always arise. He posited that the utopian vision of Silicon Valley is an illusion. Although we may all be nodes on a network of universal communication, other hierarchies emerge through competing creative forces driven by capitalism. He illustrated this by giving an historical overview of the dissemination of information, specifically as it relates to the creativity, identity, and livelihood of law librarians.

While Gutenberg's press revolutionized printing and reading in the 15th century, reading was still a privilege of a minority of elites. The Industrial Age introduced mass publication of books, which resulted in broader access to the public at large. Then the modern library emerged in the 20th century with boundaries which were self-evident. Associated with universities, law schools, and other institutions, libraries were self-contained repositories in which information was stored and accessed. Legal experts and librarians entered the elite through their own hard work, becoming intellectual aristocrats.

According to Keen, it was not until the launch of Google in 1997-1998 by Larry Page and Sergey Brin that the Internet became revolutionary, leveraging the expertise of all users to build a collective intelligence. The impact was not just technological, but cultural, creating resistance to expertise and against authority. Today, clear boundaries no longer exist between expert and amateur, library and world, lawyer and client, or author and audience. Keen stated that the collapse of these boundaries threaten our livelihoods, our professions, and our institutions. He painted a very bleak picture, which was only reversed by an emphatic call for the law library profession to proactively identify new challenges and boundaries, and therein, new opportunities.

Keen stressed that the United States is founded on the idea of abundance, but, in contrast, opportunity lies in scarcity. He stated that institutions will not survive and cannot be protected, but that everyone needs a curator to lead them through the complexities of privacy and law. Keen cited Cisco's prediction that there will be 50 billion devices connected to the Internet by 2020, and the Swedish company Ericsson's projection that everything will be networked and built around data by 2030.

In this ever-increasing digital environment, Keen encouraged law librarians to consider carefully the shift from mass participation to winner-takes-all stakes in the mastering of digital reality. In an era of increasing misinformation and cultural revolution, it is up to law librarians to excel as guides, curating data and building best practices around trust and data certainty.

A recording of the presentation is available at <http://www.softconference.com/aall/webcast/2014/wc1/wc1.html>.

Program Report

A Dialog for Catalogers and Reference Librarians: Class K from Alpha to Omega

*Georgia Briscoe
University of Colorado
William A. Wise Law Library*

Lisa Contursi: Coordinator, Columbia University
Brian Striman: Moderator, University of Nebraska – Lincoln
Tina Gheen: Library of Congress
Jolande E. Goldberg: Library of Congress
Jennifer Gonzalez: Library of Congress

Brian Striman announced at the start of this fun and informative program that it could be the most important of the annual meeting because “classification is the Rosetta stone for librarians understanding legal architecture.” Not only is the topic of great importance to understand the structure of the classification system for comparative/uniform law and international law, but the presenters are key players in the technical services American Association of Law Libraries (AALL) world. Brian was the Technical Services Special Interest Section (TS-SIS) chair for 2013/14; he is also the master jokester of technical service librarians. Jolande Goldberg, Law Classification Specialist at the Policy and Standards Division of the Library of Congress (LC), is the senior developer of law classification and is also known for her humor.

The program used the interview format. It started with a conversation between Jolande and Brian where attendees were asked to transport themselves into the living room of Goldberg's lovely home in Washington D.C. There, Brian asked Jolande a series of questions designed to deliver both “story and footnotes” on “Classification from Alpha to Omega.”

1. What is Classification? *In general, classification is the grouping of subjects into **categories** as a basis for a system for organizing knowledge. It is **enumerative and hierarchical-systematic**.*
2. What is different in Law Classification? *The core of legal classification is the principle of **regionalism and jurisdictionality**, which reflects the specific way law is searched. Hierarchy I goes from region to national jurisdiction to local jurisdiction. An example of Hierarchy II is “United States: Property: Land Law: Ownership & Possession: Tenancy.”*
3. What are Model Schedules? *LC class schedules are designed to allow symmetry for the same traditions and same subjects. For example, KIF topic terms for water rights in the Cherokee Nation of the United States-South will*

be similar to KIC topic terms for water rights of the Alexander First Nation in Canada-Western. This allows for simple comparative searches.

4. What is the deal with JX evolving or morphing into JZ (International Relations) and KZ (Law of Nations)? *This occurred because it was the collection policy of the Library of Congress to put legislative and executive papers (government and political history, diplomacy, United Nations core materials) into J and legislative process materials (constitutions, statutes, regulations, etc.) into K.*
5. What is Parallel Development? *JZ and KZ follow the same pattern: JZ5490 (peace diplomacy) is parallel to KZ5490 (peace enforcement/law of peace). Also, BP187 (sacred places in Islam) is parallel to KBP187 (sacred places in Islamic law).*
6. What are International Legal Regimes, and where are they classed? *The theory and analysis of regimes created as a means of conflict resolution by the international community are in JZ. The non-hierarchical regimes for collective self-regulation or institutionalized co-operation for conflict management (global commons) are in KZ. Political theory including **regime theory** is in JZ. Trials, history, codification of nations including **international legal regimes** are in KZ.*
7. What are Global Commons or Patrimony of Mankind? *These two phrases show how the LC Class Schedules are like a dictionary and provide common knowledge. Global Commons is used to describe international or supranational global resources such as oceans and outer space. Patrimony of mankind is a principle of international law where territorial areas of humanity's common heritage, both cultural and natural, should be held in trust for future generations.*
8. K vs. KZA: Where do we class Conservation on the High Seas and Climate Change and the Oceans? *Follow the schedule instructions: KZA3481 (marine mineral resources including subsoil of the deep sea-bed: see K3485.7). But marine resources conservation and management in **contested** sea areas, e.g., Barents Sea (Norway & Russia) class in KZA 1667 (Arctic Ocean).*
9. Where do we class International Security? *This subject classes in the art of conflict prevention: JZ6010 or KZ6010. JZ is peace promotion, peace research and education, peace movements and peace diplomacy. KZ is peace enforcement.*
10. Why are War Crime Trials in KZ and in Domestic Law Classification Schedules? *Crimes against Humanity & War Crimes were transferred from K to KZ (International Criminal Law). Many countries deal with these issues domestically, such as Guantanamo.*
11. What is the difference between JZ (Scope of International Relations – U.S.) and E (Diplomatic History. Foreign Relations – U.S.)? *JZ1310 is World Politics General Works; E744 is Diplomatic History General Works. E was one of the earliest developed LC schedules and grew to reflect the growth of United States policy.*
12. Where does the Doctrine of Discovery and Occupation fit in the LCC? *KZ3673 is Law of Nations, Concepts and principles, General works.*
13. Why is the **historic** Doctrine of Discovery still valid in North America? *The King of England discovered North America and owned it by occupation. Papal bulls supported it for the Catholic explorers. U.S. property law (Johnson v. McIntosh) has supported it for 400 years.*
14. Where is LC Indigenous Law? *All major U.S. departments now have portals or websites for indigenous concerns.*
15. Where does present day Indian Law fit in? *Law of Indigenous Peoples in the Americas is KIA-KIX. These follow the same principles as other law schedules: regionalism and jurisdictionality. The hierarchy is: North America; KIE United States (General/Comparative American Indian Law); KIG 1-30 South; KIG101-5350 Indian Jurisdictions. Subject architecture follows subject pattern of KF (US) for KIE and KE (Canada) for KIB. The schedule cross-references the equivalencies with a “see” note.*
16. How is the relationship resolved between KIE: US (Indian Tribal Law) and KF: Indians (Federal Law)? *Indian trust lands KIE520; cf. KF8215.8.*
17. How do we use maps to access information? *Jolande displayed several clickable maps showing tribal areas on the LC's Indigenous Law Portal at <http://www.loc.gov/law/help/indigenous-law-guide/americas/north-america/united-states/index.php>. Maps provide visual access and are particularly suited to the regional jurisdictional nature of legal research. They also allow for the overlapping boundaries of states and tribal nations. They provide a visual location for less well-known nations.*
18. Can classification function as a portal? *YES. The next steps are exploiting classification functionality plus making the class and portal a gateway to web content. This allows classifications to become accessible to researchers and reference librarians. The broad but detailed world of the cataloger is extended to public services.*

After Brian and Jolande finished their conversation on law classification, Brian suggested that Tina Gheen and Jennifer Gonzalez “climb through the window of Jolande’s house” and explain why LC’s Indigenous Law Portal was built. Tina explained that Roberta Schaeffer and Jolande decided the portal would make the details of the new classification clear for any user. The classification would be incorporated into the portal and serve as a Rosetta stone and dictionary. It is an important part of the Law Library of Congress online presence and includes constitutions and tribal codes. The Indigenous Law Portal is in beta now and will include Canada next and eventually all of the world’s indigenous peoples. Links will be continually added. The National Indian Law Library has been very helpful and LC wants to collaborate with more groups. Jolande’s closing comment summarized the program well: The Law Library of Congress’ “classification portal to Indigenous Law” provides “intelligent access to information.”

Program Report

Click and Go: Ensuring Smooth Access to Online Resources

Marijah Sroczyński

Milbank, Tweed, Hadley & McCloy LLP

“Click and Go: Ensuring Smooth Access to Online Resources” was presented by Suzanne Graham, Julie Horst, and Keiko Okuhara. Each brought different but complementary experiences to the talk as they outlined the definitions and differences between link rot and reference rot, and how to prevent or fix them both. A lot of important and useful information was packed into that short hour.

I was surprised to learn that the *Harvard Law Review* in March of this year found 70% of the citations in its own publications were no longer valid links. This finding illustrated just how widespread the invalid link problem is. Graham explained the two ways links can be invalid – link rot and reference rot. Link rot is when the referenced page is simply gone, while reference rot is when the page still exists but the content on the page has changed from what had previously been referenced.

To address link rot, you first need to find the problem. There are a number of products which can help track down broken links. Okuhara discussed a few free applications including Linkchecker (<http://wummel.github.io/linkchecker/>), which finds broken links in both websites and documents. She has personally used Xenu (<http://home.snafu.de/tilman/xenulink.html#Description>) with Voyager and found it very easy to use. Graham uses the native URL checker reports in Sierra, and she mentioned Innovative Interfaces also has an add-on product. As of version 3.2, WordPress has a free add-on called Broken Link Checker (<https://wordpress.org/plugins/broken-link-checker/>) that can either send an email when an error is found or can be run through a dashboard. Drupal, as of version 7, has Path Checker (https://www.drupal.org/project/path_checker), but it is not part of the out-of-the-box product so you’ll need to talk to your administrator to get it installed. LibGuides has its built-in tool called Link Checker that is available after you log in and start editing a page.

There are some drawbacks to all of these programs. No URL checker can deal with redirects or proxy servers, so they may give false reports of broken URLs. Some checkers can be told to ignore these problems, but that still is not an accurate report of what is working and what is not in your system or website. Some URL checkers cannot handle “mailto: addresses” and others cannot check pages with a “no crawler” code in the metadata.

The next step is correcting the problems you have found. You can sometimes find the new URL simply by using a search engine to find a new source for a problem link. Another source for replacement sites is the Internet Archive’s Wayback Machine (<https://archive.org/web/>). It contains nearly every website without a robot blocker, and it can be used to track down both sites that are gone (link rot) or the earlier version of a changed site (reference rot). At that point, you can then link directly to the Internet Archive’s version of the site. Memento (<http://www.mementoweb.org/guide/quick-intro/>) is another attempt to archive sites on the Internet, this time in partnership with the British Public Library. Like the Internet Archive, Memento can also be used to find both vanished sites as well as earlier versions of sites.

There are even some groups who are trying to address the problems of link and reference rot. Horst explained how the 9th Circuit Court attempted to address link rot by creating a custom-built Content Management System (CMS) in which they stored captured pages of all citations. A page would be captured when cited and then downloaded as a PDF. A watermark would be added and the page would be uploaded to the CMS. Unfortunately, some links disappeared too fast to be captured, some URLs were only available through subscription, and some citations were not specific enough to find the right page for capturing. Perma.cc is a project by a group of librarians attempting to archive copies of cited content in order to prevent both link and reference rot. They capture three versions of a citation in order to try and make the information as permanent

as possible. Archive-It (<https://archive-it.org/>) works with the Internet Archive to allow people to store their own content in the Wayback Machine.

Link rot and reference rot are definitely problems that are here to stay. Thanks to this program, though, I feel like I have many more tools to combat it.

Program Report

Orbis Cascade Alliance Summit: A Library Management Service Model for the Future

*Ellen McGrath
University at Buffalo Law Library*

Christina Tarr (University of California School of Law Library) coordinated and moderated this program, which consisted of three speakers from the University of Washington, Gallagher Law Library: Penny A. Hazelton (Director), Richard M. Jost (Information Systems Coordinator), and Alena Wolotira (Reference Librarian). In her introduction, Chris explained that this program, which was sponsored by the Online Bibliographic Services Special Interest Section (OBS-SIS), came about due to the high level of interest generated by the previous year's OBS Local Systems Roundtable meeting, which also focused on the Orbis Cascade Alliance. Unfortunately I did not attend the American Association of Law Libraries (AALL) Annual Meeting in Seattle in 2013. But in reading the report of the roundtable in last September's conference issue of *TSLL*, it is clear that these two presentations are excellent companions, with little repetition. This clearly illustrates the fact that long-term projects such as this one do warrant multiple AALL conference programs on the seemingly same topic, even in back-to-back years, as in this case.

Richard began with a brief background/overview of the system migration project, as well as a report on the systems issues experienced by the Gallagher Law Library. The Orbis Cascade Alliance has 37 members serving 260,000 students at the private and public universities and colleges of Oregon, Washington State, and Idaho. The vision of the Alliance was summed up by Richard as efficiency and productivity, resulting in the delivery of outstanding services, programs, and collections. He said that Ex Libris was ultimately chosen as the system vendor because the company seemed to best understand the Alliance's philosophy and its "new" concept of a consortium. The University of Washington was in the first of four cohorts to "go live" and was the largest institution to migrate, starting on July 21, 2013. Richard described Gallagher Law Library's participation as a double migration. The first step was to move their data from their own III system into the University's III system, and then it was moved from there into Alma, the staff or back-end next generation library management system from Ex Libris. Speaking as someone who has already endured two system migrations in my career, the thought of a double migration like this struck terror to my heart!

And that terrible feeling grew as Richard went on to describe the many challenges they ended up facing. Alma's design includes multiple zones (institutional, network, and community), but the network zone piece was not actually built yet. The training provided by Ex Libris was of no help. Problems encountered with the data migration revealed Alma's lack of flexibility. One year later, Richard said they are still learning, cleaning up data, and developing policies and procedures. Yet, he amazed me by saying it was all worth it! He emphasized that there are many current and potential rewards to this migration. Shared cataloging and collection development opportunities top the current list, with the added benefit of having all University of Washington materials accessible in one place. Potential benefits include the staff and cost savings to be realized, along with the opportunity to collaborate with the other law libraries in the Alliance.

Alena was up next and gave the reference perspective from "in the trenches." It was nice to hear that a conscious effort was made to include public and technical services staff equally in the process. Alena's role focused on communication, training, and liaising, and she delivered an account of Gallagher Law Library's (and her own) experience laced with a good amount of humor. The list of negatives continued: the Ex Libris training webinars were almost incomprehensible, the My Library account feature did not work, there was no citation management function, no permalinking, no de-duplication of records (from double migration), and multiple logins were required. Alena said that Ex Libris staff did work with them to try to address these issues, but resolution was not always the outcome. Staff tried to stay optimistic, but they eventually gave up. In September 2013, the decision was made to go with WorldCat Local as the discovery interface, rather than Primo (Ex Libris' discovery product) for one year. They will reevaluate this for the upcoming 2014/2015 academic year.

On a more personal note, Alena shared many insights about surviving the process. She said it was essential to develop a system to manage the multitude of meetings and the associated e-mails that resulted from being on so many different groups and subgroups. She emphasized the importance of being a listener and a cheerleader and being prepared for lots of

togetherness with your colleagues. Also, only venting about problems all the time reaches a dangerous point that should be avoided. Alena lamented that the Gallagher Law Library sacrificed some of its autonomy and power through this process. One example, repeated by more than one speaker, is that law faculty members are now assessed fines for overdue items. This has not been a well-received change in policy, as you might imagine.

Penny recognized the huge amount of work invested in this project by her staff. She characterized the past year as the worst of her life and went on to describe some of the more human impacts of this process. Penny bore witness to the struggles of her staff in dealing with the major frustrations of everyone “going back to zero” over and over again and more importantly, of having to adjust to delivering what they saw as a lower level of service to their users. She is still waiting for the delayed gratification of achieving major efficiencies and service goals. Penny finished up with general observations about the current state of systems. In her estimation, integrated library systems of today will never be stable and they are no longer built by the vendors, but rather by the customers. So it is essential that customers band together as in the Orbis Cascade Alliance to have even a chance of making systems development successful. Also, rote learning is out. Staff must explore, test, and problem-solve all the time. And they must re-do it repeatedly, because systems are not stable and keep changing all the time.

For me, the highlight of the program was Alena’s sharing (and spirited reading) of an actual message from one of their faculty members, two weeks into the migration process:

In this “upgrade” you seem to have forgotten that many people know, to some considerable extent, what they want and need to get to it quickly. What you have given us is a system that says “how about this, how about that, would you like some ice cream, or perhaps a roasted chicken, a new pair of shoes?” I do not wish my library to look like a Turkish bazaar. I cannot think who would find this approach useful ... designed by a committee of software enthusiasts, and idealistic librarians who would like to make us into something we are not.

I found this program very useful, as my university library system is preparing to choose and migrate to a new system over the next few years. As a non-autonomous law library, we have always had to conform to the rest of the libraries’ systems policies, so that is at least one major hurdle we will not have to clear. The three speakers had experienced library systems trends that I too have noticed (though not as directly as they have), which gave me great comfort. It inspired me to hear how they faced their many obstacles with grace and good humor, and ultimately, optimism that they will someday attain their stated vision. If they can do it, so can I. ☺

Program Report

Just in Time: Models of Demand-Driven Acquisitions for E-books

*Beth Farrell
Cleveland-Marshall College of Law Library
Cleveland State University*

Panelists for this informative program provided an excellent overview of demand-driven acquisitions (DDA) for e-books included the following: Janet Sinder, coordinator and moderator (Director of the Library at Brooklyn Law School); Gilda Chiu (Collection Development and Acquisitions Librarian at Brooklyn Law School); Edward Hart (Assistant Dean and Director of the Law Library at the University of North Texas – Dallas, speaking on his experience as Head of Technical Services at the University of Florida); and Jacob Sayward (Head of Electronic Services at Fordham Law School). A library with a DDA program for e-books loads vendor-supplied MARC records into its online catalog. Patron interest in the e-books triggers acquisition of titles. While this process seems simple (especially from a patron’s point-of view!), the presenters did an excellent job of detailing all the intricacies of setting up a DDA program.

Obviously the biggest decision is choosing which DDA vendor to use. Gilda at Brooklyn uses Yankee Book Peddler’s (YBP) multi-vendor DDA program and offers e-books on the Ebook Library (EBL) and EBSCO platforms. Jacob at Fordham uses EBL Direct (not through YBP), offering e-books on the EBL platform. The provider/platform Edward used at the University of Florida was Ingram’s iLibrary.

After choosing a vendor, one of the next big steps is setting up your library’s profile for MARC record delivery of e-books. Brooklyn loads MARC records for YBP’s e-book offerings in the “K” class, but they do exclude some books by content type (translations, casebooks, reference titles etc.). Also, Brooklyn does not load MARC records for titles they already have in print. Finally, because YBP can often provide the same e-book on different platforms, Gilda had to rank her preferred e-book suppliers. Fordham loads MARC records for all e-books in the “K” class, including titles they already have in print. The presenters also mentioned that you can load MARC records on a title-by-title basis if you come across interesting titles that didn’t get automatically delivered to you via your profile.

Brooklyn and Fordham receive MARC records for e-books fitting their profiles on a weekly basis. Gilda reports that YBP offers free customization of the OCLC MARC records they provide, and that they had a training session for Fordham catalogers. A library can choose to remove a MARC record at any time (for instance, if a new edition comes out), and publishers can also “pull” e-books and libraries would be notified that they have to delete the corresponding MARC record.

Libraries must also decide how many short-term loans they would like to have before a purchase is triggered. If a patron views a title for more than a certain number of minutes or prints out a certain percentage of the pages, a short-term loan is triggered. After a book has a certain number of short-term loans, a purchase is triggered. The short-term loan is a percentage of the book’s price, depending on the publisher, and any short-term loan costs are generally not applied to the purchase price. Both Brooklyn and Fordham have two short-term loan periods per title – any significant usage after that triggers a purchase.

Other issues discussed in the session included loan periods for e-books, user authentication methods, usage statistics/obtaining feedback and ways to promote a DDA program. The issue-by-issue Q&A format was a great choice for this session because the listeners could compare how each library handled the many options of the DDA e-book program. Overall, this was a well-organized session which would be extremely useful to any attendee considering a DDA e-book program.

Program Report

*Carol Morgan Collins
University of Tennessee
College of Law Library*

Emerging Issues in Copyright: What You Need to Know

Presenters:

D.R. Jones, Associate Dean for Information Resources, Law Library Director and Assistant Professor of Law, University of Memphis Cecil C. Humphreys School of Law

Meg Kribble, Research Librarian and Outreach Coordinator, Harvard Law School Library

Kevin Miles, Ph.D., Librarian, Norton Rose Fulbright, Dallas, Texas

During this session, speakers reported on copyright issues of interest to the library community. Topics included the first sale doctrine (17 U.S.C. § 109); fair use (17 U.S.C. § 107); and recent copyright legislation, hearings, and roundtable statistics.

Wolters Kluwer’s Aspen Law Connected Casebook is one example of a recent first sale doctrine encroachment. Under the arrangement, students purchasing copies of Aspen’s casebooks, which are accompanied by access to an electronic version, are required to return the used print books to Aspen while maintaining access to the digital copies. Preventing the resell of lawfully purchased books violates the first sale rule.

The exclusive right of copyright holders was at issue in two notable digitization cases: Google Books (2004-2013) and HathiTrust (2004-2014). At this time, the standing is that the projects, with a few exceptions, were within fair use parameters. In both cases, the judges deemed that adding search capabilities and metadata transformed the books and created new information and insights to the original works. The impact of these decisions to libraries is further support for fair use protection of transformative, innovative projects and new research possibilities with greater discovery potential.

In a case often referred to as the “Georgia State Copyright Case,” Cambridge University Press, SAGE Publications, and Oxford University Press alleged that Georgia State University violated the fair use doctrine of the copyright law by copying and distributing vast amounts of material through the University’s E-reserve system for students to access. In 2012, the District Court opinion denied a fair use injunction and awarded the University attorney’s fees. The basis of the finding was Section 107, which allows multiple copies to be made for non-profit, classroom use. In addition, the entire book, not a chapter, was considered as the work, and the amount of the title copied was within the 10% limit. The court also determined that excerpts of the work were not available in a format convenient to users. The case is on appeal.

In 2012, attorneys brought suit against West Publishing and Reed Elsevier alleging copyright infringement. Publishers downloaded and placed legal briefs and motions available through the PACER website into searchable databases. The court maintained that the publishers had not infringed on the attorneys’ copyright because the publishers’ use was significantly different from the original purpose of the works. By adding value (metadata) and placing the documents in an interactive research tool, the use was transformative and not a violation of copyright law.

Also in 2012, publishers alleged copyright infringement against four law firms. The law firms copied scholarly articles to accompany patent applications. The court held that copying for purposes of completing a patent application was a transformative use and not a violation of copyright law.

During the first half of 2014, there were seven bills before Congress, five hearings before the House Judiciary Committee, four Copyright Office roundtables, and four multi-stakeholder forums related to copyright law. The speakers urged information professionals to remain vigilant by viewing current awareness sources and contacting legislators with concerns about copyright legislation.

Program Report

The Law and Ethics of Aggregation and Content Distribution

Cathy Cochran
University of Tennessee
College of Law Library

Presenters:

Jean O'Grady, DLA Piper (Coordinator)

Andrew Deutsch, DLA Piper (Speaker) Andrew was unable to attend, and Jean read his comments along with his slides.

Michael Stelzer, Knowledge Management Services (Speaker)

Jean O'Grady presented Andrew Deutsch's information, which focused on news aggregations, news publishers, and copyright:

Creative aspects of news reports (e.g., selection and arrangements of facts) and ledes ("the opening sentence or two in a wire service story, which contains the key information of the story") are copyrightable. (See the Meltwater Case: *The Associated Press, v. Meltwater U.S. Holdings, Inc.; Meltwater News U.S., INC.; and Meltwater News U.S. 1, Inc.*). Meltwater offered an alert service that searched news sites, copied the ledes, and sent information about articles such as the headline, source, excerpts, and URLs to subscribers. The court found that Meltwater's service was not protected under the fair use doctrine and was an infringement of the Associated Press' (AP) copyright. The court found that taking the ledes and aggregating them was not transformative. AP licenses this content to other entities for the same purposes. Essentially, Meltwater chose not to purchase AP's content. The fact that Meltwater's product was not publically available weighed against them.

A warning was issued to think before using Internet aggregators and alert services that search the web. If you are preparing alerts or summaries from a licensed source, ask yourself whether a license is required for preparation of daily summaries. Perhaps not, if you do not distribute your alerts beyond the boundaries of your organization. Some firm lawyers think that they can send out articles from other firm partners, without questioning if the authors retain copyright. (Just because you wrote it, doesn't mean you own it.) This example points to the need to educate high-level stakeholders.

Mike Stelzer's presentation:

Stelzer began by asking the audience, "How many of you think people go to jail over copyright infringement?" Only a few in the audience answered affirmatively. He corrected this assumption and shared the results from a Google search "Imprisoned for copyright." The search results indicated 87 months in prison was a common sentence.

He encouraged organizations to audit the sources and uses of content throughout their operations. He stressed usefulness of consolidating information about the copyrights, licensing, and permissions through a central clearinghouse within the organization. He suggested that all aggregations and distributions of licensed content be cleared through this central clearinghouse. He stated that because his company has offices in other countries, the use and distribution of content must comply with the laws of each country.

Stelzer gave TinEye as one example of a service that searches for the source and identifies the copyright holders of images. TinEye has the copyright owner information for 5.2 billion images.

He cautioned to never assume a web developer has gotten the licenses for their images, using an example from his firm in which they received a cease and desist letter about an image used on his firm's website. An erroneous assumption was that it was permissible to use the image because the web developer provided it. He suggested asking vendors before a content purchase if they have the rights to sell that content. Finally, ask to see the license documents. Often the documentation is not available.

Make sure you read the terms and conditions of use and distribution for desired content because copyright owners can track where their content is being used. He gave Moreover.com and the Huffington Post as examples of clearly written terms and conditions statements. He also noted that web content, despite being easily accessible, is almost always copyrighted. He recommended checking the terms of use statement and verifying that the source is credible. Redistribution rights may present

additional risks. Stelzer recommended using the vendors' alert services because, presumably, they have redistribution rights.

My takeaways:

- Read the terms of use.
- Educate stakeholders.
- Establish a centralized clearinghouse to review an organization's use of content.
- Verify 3rd party licenses (Meltwater case and web developer example above).
- Use services to find out who owns the rights to images and other materials.

Find handouts from the conference at <http://aall.sclivelearningcenter.com/index.aspx>.

Program Report

Law Librarianship in the Digital Age

*Beth Holmes
Partridge Snow & Hahn*

Presenters:

Jennifer Alexander, McKenna Long & Aldridge
Scott D. Bailey, Squire Sanders
Valeri Craige, University of Utah
William R. Mills, New York Law School
Ralph A. Monaco, New York Law Institute
Carol Ottolenghi, Ohio Attorney General
C. Andrew Plumb-Larrick, Case Western Reserve University
Thomas Striepe, University of Georgia

This unique session managed to keep my attention for the entire hour even though it was in the last time slot of the conference. Each of the eight speakers wrote chapters in the recently published monograph *Law Librarianship in the Digital Age* edited by the program's moderator, Ellysa Kroski of the New York Law Institute, and published by Scarecrow Press. What made this session different from many others I've attended is that each speaker on the panel presented using PechaKucha 20X20 style. This is a Japanese presentation style in which each talk consists of 20 images (or slides) each shown for just 20 seconds before automatically showing the next slide. Each talk was about seven minutes in length and featured interesting photos or slides, making the presentation concise and memorable. Many presenters added humorous photos/slides which were a welcome addition and an aid to remembering content.

This program was a glimpse into the content of the book, *Law Librarianship in the Digital Age*, which is a guidebook for law librarians who want to become digitally literate as well as gain an understanding of recent advancements and trends in information technology. I learned so much during this program that I can't possibly share all of it, but here are my main takeaways.

From Bill Mills on Tablets and Mobile Device Management:

- Librarians need to be seen as trending and trend setters.
- Librarians as managers of digital resources and devices is one way to be trend setters.

From T.J. Striepe on Embedded Librarianship:

- Embedded librarianship is on a sliding scale that goes from visiting patrons where they are to actually living there with them.
- Form a relationship with your patrons.
- Librarians at the University of Georgia roam the faculty hallways with iPads to demonstrate legal research apps, but also to talk about non-library topics so that they can build relationships.

From Carol Ottolenghi on Digital Age Marketing:

- It's not enough to do good. We need to be caught being good.
- We need to sell the librarian skill set to our users, our potential users, and to the people who control the budget.
- Tell them in ways that they can hear you.

From Scott Bailey on the Future of Law Librarianship:

- Librarians are the product. Don't let the tools (or the vendor) get in front of you.
- Monetize your services and show how you add value.
- Go to your patrons and communicate in the language of your business – be relevant!
- Don't be afraid to experiment.

I just ordered the book and am looking forward to reading and learning even more.

**Save the Dates for the American Association of Law Libraries
(AALL) Management Institute: March 26-28, 2015**

The 2015 AALL Management Institute will be held at the Palomar Hotel in Chicago on March 26-28, 2015. The Management Institute will provide participants the opportunity to build management skills, collaborate with colleagues from different types of libraries, learn in a small-group setting, and develop techniques to manage with confidence. More information will be available soon!

***TSLL* EDITORIAL POLICY**

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