Technical Services Law Librarian

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INSIDE:

Program Report

Crowdsourcing: A Skillset to Manage the Legal Information of the Future (Program A3)

Jen Fell
Sacramento County Public Law Library

Coordinated by Sarah E.M. Lin (Reed Smith LLP) and moderated by Jennifer Noga (Wake Forest University), this interactive and inspiring program highlighted the skills information professionals should acquire and strengthen to better prepare themselves for the changing landscape of legal information. Panelists included Ashley Moye (Charlotte School of Law), Melissa Beck (UCLA School of Law), Megan Von Behren (Fried, Frank, Harris, Shriver & Jacobson LLP), Sara Campbell (State of Oregon Law Library), Mark Giangrande (DePaul University College of Law), and Wendy Moore (University of Georgia).

The program commenced with a discussion of change and a thought-provoking question: how do we develop skills if we don't even know what world awaits us? Panelist Ashely Moye pointed out that if we as information professionals learn to accept and expect change, then we will be better equipped to respond to and rebound from whatever changes may come. She suggested a few ways to better prepare for uncertainty: first, by understanding and leveraging our response to change; and then by strengthening our emotion intelligence (EI), which can help us adapt to new landscapes. Like many other skills, we can develop emotional intelligence at any age, and it requires further development of our interpersonal and intrapersonal skills.

Much like managing change, maintaining passion throughout the entirety of one's career does not come naturally; like any other skill, one must put in the time and effort necessary to periodically "refresh" one's interest and excitement for current work and future prospects. Panelist Megan Von Behren detailed the ways in which one can once again become a "blushing young librarian." Tips included seeking out projects that demand the development of new skills and knowledge and daring to venture outside your comfort zone. As we all know, no man is an island; "drafting" off colleagues' passion and positive outlook can recharge our own spirits, and sometimes we simply need someone to listen to our problems. Ultimately, she maintained that passion must come from within, and *you* can always inspire you.

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

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Online Bibliographic Services Special Interest Section

Seeds of Hope

"*The past is never dead. It's not even past.*" William Faulkner's Requiem for a Nun

As the incoming Chair of the Online Bibliographic Services Special Interest Section (OBS-SIS) for a second term, I want to convey my deepest appreciation to its members for another opportunity to serve you. In this column, I will reflect on the success of the 2016 American Association of Law Libraries (AALL) Annual Meeting and acknowledge the need for us to continue this momentum in the days ahead of us.

Without a doubt, the 2016 AALL Annual Meeting was a "game changer" for technical services librarians! For example, I have heard from a number of technical services librarians that the conference programming was not only high-caliber, but it provided a space to engage in dialogue with colleagues who are confronting and working on solutions to the same challenges. Most importantly, I was excited to hear that your minds were energized as a direct consequence of the programming! For this successful outcome, I would like to express my gratitude to the OBS-SIS Executive Board and the Education Committee for 2015-2016. The members of the Executive Board were as follows:

Karen Selden, Past Chair;
The late Calmer Chattoo, Vice-Chair/Chair Elect;
Melanie Cornell, Secretary-Treasurer (2015-2017);
Barbara Ginsburg, Member-at-Large (2014-2016); and
Jacqueline Magagnosc, Member-at-Large (2015-2017).

With **Karen Selden** taking the lead**,** the OBS-SIS in collaboration with the Technical Services Special Interest Section (TS-SIS) and the Computing Services Special Interest Section (CS-SIS) presented four programs and one workshop at the Annual Meeting in Chicago:

- **W5: Linked Data and BIBFRAME in Action: From Theory to Practice,**
- **Creating the Future of Discovery and Research: BIBFRAME 101 for Library Directors (and Everyone Else),**
- **Search Does Not Equal Research: Implications for Discovery Layer Design (sponsored by the OBS-SIS),**
- **Promoting the Value of Technical Services at Budget Time: Practical Advice for Directors and Managers (co-sponsored with TS-SIS), and**
- **Sustainable Planning for a Digital Repository (co-sponsored with CS-SIS).**

Although a second workshop, ***Resource Description and Access*** **(*RDA*) Hugo-a-thon,** sponsored by the OBS (coordinated by **Jacqueline Magagnosc)** and TS was included in the programming for the 2016 Annual Meeting, it had to be cancelled due to low numbers. For the Annual Meeting in Austin next year, the OBS and TS Education Committees will explore ways to reduce the cost for convening workshops. If you missed the excellent OBS/TS/CS/ programs, along with others, at the Annual Meeting, the recordings are available at http://www.aallnet.org/mm/Education/aall2go/amrecordings/aall2016.

The 2016 OBS-SIS Education Committee was led by **Marjorie E. Crawford,** Chair, and the members were **Karen Selden, Georgia Briscoe, Stephanie Edwards, Gypsy Moody, Kathy Faust, Ruth Funabiki, Allison Jones, Caitlyn Lam, Sarah Lin, Jennifer Noga, Katrina Piechnik, Patricia Sayre-McCoy, Christina Tarr, and the late Calmer Chattoo.**

In addition to the focus on professional development opportunities at the 2016 Annual Meeting, the OBS Executive Board and the Education Committee executed successfully:

- the CONELL Marketplace;
- the Joint Reception;
- an OBS Poster Exhibit; and
- the User Group meetings.

Besides the Executive Team, the OBS was blessed with a cadre of extraordinary people who made a significant contribution to our SIS last year. Therefore, I owe a debt of gratitude to the chairs and members of the standing committees, as well as the SIS representatives. These committees include the Local Systems, Nominating, OCLC, Web Advisory, the OBS/TS

Joint Research Grant (FROG), and the OBS *Technical Services Law Librarian* (*TSLL*) Editorial Board Representatives. **Keiko Okuhara** continued to post the OBS Legal Website of the Month. For this "labor of love," words are inadequate to express my thanks to **Keiko.**

At the conclusion of the 2016 fiscal year of AALL, **Barbara Gingsburg** completed her term as **Member-at-Large** for OBS. **Tim Knight** stepped down as our webmaster. On behalf of the OBS-SIS, I extend our deep appreciation to both of these individuals. With pleasure, I welcome to the Executive Board **Jennifer Noga**, **Vice-Chair/Chair Elect**, and **Patricia Alvayay, Member-at-Large.**

I am looking ahead to our new year with anticipation that the OBS-SIS will surpass our accomplishments in 2016! To this end, I challenge each of my colleagues to be an integral part of our vibrant future by sharing your ideas, volunteering, and supporting the strategic direction of the OBS-SIS. Furthermore, volunteers are welcomed and needed to serve on OBS Committees.

For the 110th AALL Annual Meeting, President Ronald Wheeler has selected the theme "Forgo the Status Quo." Planting the seeds of hope, I encourage each of my colleagues to respond to the call for educational program proposals for the 110th Annual Meeting. The Proposal Collection website opened on September 6th and will close on October 3rd. Information regarding the program proposal process is available at http://www.aallnet.org/conference/education/future-meetings/program-proposers/call-for-proposals.html.

If you have a great idea or problem that you would like the OBS-SIS Education Committee to consider for a program proposal, please contact me at mcrawford@kinoy.rutgers.edu. Remember, the OBS needs your voice in order to communicate, educate, connect, and advocate on your behalf effectively!

Marjorie E. Crawford
Rutgers University

From the Chair

Technical Services Special Interest Section

"Don't Let the Perfect Be the Enemy of the Good." I wonder just how many times I have heard or seen that expression, or a variant of it, in both my professional life as well as completely outside of work. Working within a professional specialty that has, let's just say, by and large not seen robust levels of staffing or funding for quite some time, I would wager that many of us feel we have many—perhaps too many—projects, goals, and objectives to achieve. We are a pretty detail-oriented contingent of professionals who want to get things right. Yet, in order to keep all the flaming torches and buzzing chainsaws in the air (and maybe even set one down gracefully once in a while), it's helpful to realize when things are actually in pretty good shape.

In that spirit, I'd like to take a few moments to mention some Technical Services Special Interest Section (TS-SIS) areas folks are working diligently on, which are in good shape. First, the TS Professional Development Committee and its various subcommittees are already hard at work to identify and work with members to put on programming of benefit to us in the coming year. One subcommittee is working on programming for the next American Association of Law Libraries (AALL) Annual Meeting in 2017 in Austin. They have ideas from the call for ideas in Ideascape in August, but I'm sure Jackie Magagnosc and the other subcommittee members wouldn't mind hearing from more volunteers before the October 3 program submission deadline.

The other two subgroups (on forums, led by Suzanne Graham, and webinars, led by Hollie White) are also hard at work to provide continuing education opportunities throughout the coming year—not just in July. This is an issue especially near and dear to me—I've heard from lots of members on the biennial survey who indicated a desire for more programming outside of the Annual Meeting. This point makes me think a bit of universal design in web-based and other systems—you design to accommodate those folks who might need the most help navigating or using the system, and those design elements usually end up helping everyone using it. These webinar and forum efforts can benefit both those of us who are unable to attend AALL often and those of us who can attend most years.

Another successful area of importance is the recognition of contributing and up-and-coming members through the various TS grants and awards. I am especially pleased we are making efforts to assist TS members to attend the Management Institute and the Leadership Academy, as well as awarding the Marla Schwartz grant. These are especially visible fora where attendees get to know individuals from across AALL pretty easily, many of whom go on to leadership positions within the Association. It's a great opportunity to help get the TS name out there!

I also wanted to say a few words about collaboration across Special Interest Sections. When I went to SIS leadership training in Chicago, we received some remarks from AALL President Ronald Wheeler, who was especially encouraging about collaboration among the various SISs within AALL. TS certainly has a long history of working with the Online Bibliographic Services (including on the publication this column appears in!), but has reached out at various times to the Foreign, Comparative & International Law Special Interest Section (FCIL-SIS), the Academic Law Libraries Special Interest Section (ALL-SIS), and other sections. Thus far, since July, I feel there's a real energy within the SIS Council (and its My Communities space) to work together more closely on issues of concern to all of us.

So, is there more work to do? You bet! I anticipate having a busy year working with the above people and groups, as well as on other initiatives that we need to keep going, such as taking a closer look at the role and function of our different committees. Please feel free to reach and contact me with your questions and concerns!

Eric Parker
Northwestern University

Technical Services Law Librarian (*TSLL*) Annual Report July 2015-June 2016

The *Technical Services Law Librarian (TSLL)* volume 41 had four issues, published in PDF and available on the *TSLL* website at http://www.aallnet.org/sections/ts/TSLL/Issues and on HeinOnline at http://heinonline.org/HOL/Index?index=lcc/tsll&collection=aallar. Michael Maben completed his third year as *TSLL*'s Editor-in-Chief and was very grateful for the excellent assistance provided by Sabrina Davis, Associate Editor; Julie Stauffer, Layout and Design; and Martin Wisneski, Web Manager. Staff published all issues for Volume 41 on schedule. The Editor-in-Chief greatly appreciates the work done by our dedicated columnists and editors.

There were a few columnist changes through the year. In September, Jason LeMay took over the OCLC column. Beginning with the December issue, Sara Campbell began writing the Acquisitions column and Adrienne DeWitt took over the Collection Development column. In March, Angela Hackstadt began writing the Serials Issues column, and finally in June, Matthew Jenks took over the Preservation column.

Concerning the Editorial Board, Marijah Sroczynski and Corinne Jacox completed their two-year terms. The other Board members for 2015/2016 were Caitlyn Lam and Jennifer Fell, and the staff greatly appreciates their support.

With Volume 41, *TSLL* published fewer guest columns and special reports than in past volumes. In December there was a reprint of a column title "Cataloging as Value-Added Library Service" written by Melissa Powell and originally published on the Colorado Virtual Library website. The September issue was largely reports from the Annual Meeting in Philadelphia, while the June issue had the announcement of the Renee Chapman Memorial Award.

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

Michael Maben, Editor-in-Chief
Indiana University, Bloomington
Jerome Hall Law Library

Workshop Report

Linked Data and BIBFRAME in Action: From Theory to Practice

Lia Contursi
Columbia University

Paul Frank, *Cooperative Cataloging Specialist, Library of Congress*
Rachel Fewell, *Central Library Administrator, Denver Public Library*
Steven Folsom, *Metadata Technologies Program Manager, Harvard University*

Paul Frank opened the session with a comprehensive description of the Bibliographic Framework Initiative (BIBFRAME) Pilot Project, which unfolded from September 2015 to March 2016 at the Library of Congress (LC). This project was design to give LC catalogers an opportunity to test BIBFRAME for routine work. Labeled Phase 1, it relied on the understanding and use of BIBFRAME Editor 1.0 for the creation of bibliographic data. Forty catalogers participated in Phase 1, and their main task was to produce bibliographic descriptions for a variety of materials such as monographs, serials, music scores, sound recordings, prints, and photos. The resources were in various languages and scripts, and the task was to provide cataloging in MARC first (as the regular routine requires) and then in BIBFRAME Editor. The twofold effort, however, was not required for authority work. The preparatory training for Phase 1 consisted of workshops and webinars on the Semantic Web and Linked Data. These are the two essential concepts at the foundation of BIBFRAME, which will ultimately allow libraries to publish their bibliographic data on the Internet so that users can retrieve it in a meaningful and contextualized way. The basic training at LC also included an introduction to the fundamental concepts of Resource Description Framework (RDF) standards. RDF provides a method to describe all types of resources in a way that permits interlinking them appropriately on the web. The concerns that emerged during Phase 1 were related to the ability of catalogers to input *Resource Description and Access* (*RDA*) descriptions into BIBFRAME. Would catalogers be able to transfer data typically edited in MARC to the BIBFRAME model? How would the process of translating from MARC language to BIBFRAME work?

In order to stage a fairly realistic BIBFRAME environment against which catalogers could measure their ability to link bibliographic elements appropriately and consistently, they converted a large portion—but not all—of the LC records in MARC format to RDF serialization. They used authority records that they had already converted from MARC to RDF to provide a reliable and reasonably functional platform to create new data with BIBFRAME Editor. A problem immediately evident was the realization that BIBFRAME is not at all harmonized with the Functional Requirements for Bibliographic Records (FRBR) model. In fact, one of the most significant challenges was the recognition that BIBFRAME forces *RDA*/FRBR entities such as Work and Expression into the single BIBFRAME entity of Work. There is no direct and straightforward correlation between the entities underlying FRBR and those that belong to BIBFRAME. Practically speaking, such discrepancy posed a major obstacle in the production of work with the BIBFRAME Editor, and it generated many doubts and discussions among the catalogers. Complications arose, for example, when catalogers would work on revised editions of a title. These are treated as Expressions in *RDA*, but such entity disappears in BIBFRAME. However, even more insurmountable seemed to be the persistent habit of using the MARC encoding meta-language while discussing cataloging issues with BIBFRAME (it is not helpful to continue to say 245 instead of title proper or calling a variant title a 246). Such impropriety was a serious reminder that MARC does not translate correctly into the BIBFRAME conceptual world. It also taught the valuable lesson that it is crucially important to abandon the MARC terminology and to use instead more appropriate *RDA* terms, in order to comprehend fully the *RDA* concepts applicable to BIBFRAME. Unexpectedly, however, the catalogers in Phase 1 developed a keen interest in reading and understanding the serialization of RDF, which greatly helped them comprehend the underlying functions and properties of BIBFRAME Editor. Phase 1 unearthed numerous discrepancies between the terminology of *RDA* and BIBFRAME, thus pointing out the need to develop a more congruous and expanded vocabulary, which should be capable of reconciling concepts between the two models. As a result, the experts at LC have worked on a new version of BIBFRAME called BIBFRAME Editor 2.0. This will be used for the BIBFRAME Pilot Phase 2. All the resources the catalogers at LC used to prepare for Phase 1 are available on the webpage titled *BIBFRAME Training at the Library of Congress* (https://www.loc.gov/catworkshop/bibframe/), while the data produced during the Phase 1 is available at http://bibframe.org/static/data/lc-bibframe-pilot.zip.

Rachel Fewell explained the crucial reasons that initially drove libraries to experiment with BIBFRAME. In a world that seeks information more often and increasingly more exclusively on the web, libraries—and even more so, public libraries—face the risk of exhausting their traditional functions of organizers of knowledge and providers of reliable information. At an early stage, Fewell and her colleagues at the Denver Public Library (DPL) became acutely aware that soon libraries might be completely overshadowed by all those commercial companies that are so prominent on the web. Realizing how important BIBFRAME may be as the vehicle to propel libraries' information to the front stage of the web, in 2014 Fewell and her team decided to experiment with Linked Data in collaboration with LibHub. The LibHub Initiative is a pilot program founded by the company Zepheira. Using the knowledge of BIBFRAME and Linked Data, the experts at LibHub cooperate with libraries converting sets of MARC records into BIBFRAME and publishing the results on the web as interlinked resources. DPL decided to undertake this groundbreaking venture using data from their special collection of Molly Brown's papers. Brown was a survivor of the Titanic and a prominent local, historical figure in Denver. DPL hosts her collection of personal papers, which is considered an important archival resource. They sent only a small portion of the archival data of the collection to LibHub, who then converted it into BIBFRAME. The project was called *The Linkable Molly Brown* and was considered a great success, returning the results for which Fewell and her team had initially hoped. If you type "Molly Brown papers" in a Google search box, you will be able to retrieve the bibliographic record for the Molly Brown Papers Collection residing in the online catalog of the Denver Public Library. This is only a small result from a small experiment of BIBFRAME conversion, but it represents compelling and very tangible evidence of the big promise of BIBFRAME and Linked Data.

While Paul Frank and Rachel Fewell described the role and the work of libraries and the aspirations and promises of BIBFRAME and Linked Data for librarians, Steven Folsom's presentation focused on some technical principles and tools people are currently researching to better understand and create bibliographic data that they can semantically link and search for on the web. This part of the talk was challenging, given the purely technical nature of the exposition. However, Folsom was able to explain clearly some of the most important aspects of the preparatory work that is necessary to fully implement BIBFRAME and to interconnect the world of knowledge that we hold in our libraries. Folsom talked about Linked Data for Libraries (LD4L) and its current project called Linked Data for Production (LD4P), which is a funded cooperation of six institutions working to develop (1) a model to produce metadata as Linked Data and (2) the necessary BIBFRAME ontology to describe all types of resources libraries own. As a team member of LD4P, Folsom stressed the importance of using the existing ontologies for Linked Data, and he pointed out the need for expanding them to include metadata of all the fields of knowledge represented in our library catalogs. However, ontologies must be compatible with all types of resources libraries have, and specialized ontologies should be "agnostic." Ontologies are crucial for the development of Linked Data for libraries. In library science, an ontology is nothing but a structured classification of concepts and functions pertinent to a particular field, discipline, or domain. It is essential to classify a domain complete with its hierarchy of subclasses and super-classes in order to identify all of the properties of every element of a domain and connect them with related elements. Ontologies are essential to describe types of resources and their parts and to link them appropriately. Folsom emphasized the importance of building ontologies starting from the analysis of use cases or scenarios, because understanding how people search for resources allows you to comprehend what the ontology is for and how the users interact with the materials described. He provided the following two examples:

Examples of Cartographic Uses:

- *As a **Student** studying land development of Austin, Texas, 1960 to the present, I would like to compare **a map** from each **decade** at a **scale of 1:50,000 or larger**.*
- *As the **Maps Librarian** responsible for curating exhibits, I would like to identify and select material from my library's **collection** of **maps** that show **natural features** in **New England**.*

The words in bold express crucial keywords that are essential in the domain of cartography. They represent classes or subclasses of entities in which researchers and all map users are mostly interested. Some of the classes are shared by other fields and ontologies. These are the terms that catalogers need to properly connect in a structured hierarchy in order to create a Semantic Web for cartographic materials.

To make the concept even clearer to the audience, Folsom offered use cases/scenarios within the domain of law:

- *As a lawyer, I need to compare **judge rulings** in the **last ten years** decided by a **particular judge** on **renter's rights**.*
- *As a clean water **activist**, I need to identify **state** and **federal legislation** related to **land rights**.*
- *As a researcher, I need to locate **works** on a specific **case**.*

As law librarians we should ask ourselves:

- *What kind of materials are important for our users: series, serials, government documents, statutes, agreements, contracts, cases, etc.;*
- *How these categories fit into existing ontologies; and*
- *How our users look for materials: by jurisdiction, by author, by judge, by signer, by plaintiff, by defendant, etc.*

We need to analyze all similar cases or scenarios in order to define a special ontology. However, to create data that links things properly, it is necessary to build from existing ontologies and to expand those to other domains when needed, being very careful to harmonize all the various ontologies so they can be broadly interconnected. Another crucial building block for Linked Data is to create clean, usable data while taking advantage of data from other communities at the same time. Linked Open Vocabulary (LOV) (http://lov.okfn.org/dataset/lov/) is a good starting point to check existing ontologies.

Folsom also encouraged the community of law librarians to familiarize itself with sources of Linked Data, such as Linked Open Data (LOD) Laundromat (http://lodlaundromat.org/about/). This is a standard, compliant open-source service that has the capability to correct data compromised by syntax errors and similar issues and to restore data so it can be re-used in Linked Data. This allows the creation of usable data that creators can share. The ultimate objective of shared ontologies and clean data is to be able to make the semantic connections of information as standardized as possible, so we can link the isolated containers of data we all have now (our online catalogs) and search them on the web.

Other experiments that we should explore are the use of tools for data conversion, such as MARCEdit. One of the newly developed features of this software is the Build Links Tool, which has the ability to look up Uniform Resource Identifiers (URIs), which catalogers can then insert into appropriate MARC fields. Recently, Gary Strawn developed an authority toolkit to grab URIs from the web and add them to the authority record. This is another example of effective use of URIs to connect data and put it in a larger context. Folsom strongly encouraged the audience to get increasingly more involved by reading about projects on Linked Data and by following discussions in discussion lists, such as BIBFRAME List or the Protégé users list. We should look for training opportunities like those offered by Library Juice Academy (they have courses on ontologies and Linked Data). Also, Protégé offers short courses on ontology web language (OWL) and ontology design. We should attend non-library conferences on the Semantic Web when possible. At this stage of the process of development of BIBFRAME and Linked Data, we should all read and experiment with ontology decisions and get engaged for a better understanding of new metadata techniques.

Opening General Session/Keynote Speaker

Ashley Moye
Charlotte School of Law

Nothing compares to the energy in a room during the opening session and keynote speaker. Everyone's still fairly bright-eyed and bushy-tailed (even those who arrived early to attend events on Saturday) and brandishing their blank notebooks, fresh pens, and fully-charged batteries on their laptops and mobile devices.

The 109th American Association of Law Libraries (AALL) Annual Meeting, involving over 2,500 people, featured a theme of "Recreating Ourselves." A fairly apropos theme in the scrappy city of Chicago, which recreated itself after a raging fire destroyed a significant portion of the city and left hundreds of thousands of residents homeless in the late 1800s. This idea of "recreating ourselves" resonates strongly with law librarians, as today's current environment marked with rapid change and repeated disruption often leaves us struggling to answer the question "How can we respond effectively?"

The keynote speaker, Will Evans, addressed that very conundrum and offered us new models of purpose-driven innovation and practices we can engage in to face uncertainty—in short, a way to envision something better and close the gap between the current state of affairs and this "better world." His presentation was both humorous and engaging, and more importantly to the particular breed that is the librarian—he's not possessive about the intellectual property he's offering, allowing you to take, reuse, and remix all of his program materials in any way you'd like.

At the beginning of his presentation, he threw in an icebreaker of sorts, asking audience members to take a moment to turn to their neighbor and ask, "Why do we need law libraries?" and take a photo of them, then post both the photo and answer on Twitter with the official AALL conference hashtag. Ramping up the excitement in the audience and letting ideas flow for a few minutes provided everyone with a chance to play active participant and return to our listener roles with fresh ears and fresh minds, engaged and brimming with positivity.

Evans is from the design community and focuses on the user experience, so he tackled the subject of commoditization and automation with a fairly balanced perspective. While we may all have built-in, knee-jerk negative reactions to automation of current manual tasks, it's important to note that automation offers more affordable and standardized responses to tasks, boosts productivity by allowing less people do the same amount of work, and takes a piece of the monopoly pie away from lawyers in general.

When a variety of our traditional job tasks are moving towards automation, it leaves us in a position where we have the bandwidth available and the impetus to reach out and determine new mechanisms of value, finding new problems to solve for our customers, and learning ways to collaborate more effectively with each other.

Think about it—our job descriptions and often our job tasks themselves are only a fraction of the skills each of us have to offer as legal information professionals, and as a result, we are tapping into only a fraction of these skills on a regular basis. By using lean methods, we can learn more about our customers' unique wants and needs, dial in to the full range of skills we offer, find new ways to create and provide value through new solutions to previously unsolved or poorly-solved problems, and most importantly, become increasingly more engaged in our professional lives.

Originally developed at Toyota, lean approaches use lightweight methods to explore new value creation and focus on maximizing learning before moving forward with solutions and doing any heavy lifting on initiatives. Talk to your customers, and work to invalidate assumptions you may have about what will deliver measurable value. Next, formulate a hypothesis on ways you can provide value, collaborate with your colleagues, and experiment. Never jump straight in to a solution, because with lean methods, learning and experimentation take center stage. Remind yourself that learning doesn't equate with failure.

Establish that services and products meet a need before you amplify any efforts. Think about it. How often does someone develop a product or service and it fails because, when all is said and done, there aren't any customers lining up for the goods. In traditional product cycles, which include defining, designing, developing, and deploying, the learning stage takes place AFTER the deployment of the product—and may consist only of learning that no one really wanted your product to begin with.

A lean approach, conversely, is to build, measure, and learn, focusing on shortening the time between idea and deployment (in other words, the time until you learn) to a week or even a day. Evans put it best when he said "Life is too short to build something nobody wants." So always ask yourself, "Are we creating value?" and "Are we learning?"

When your objective is to learn, you'll be encouraged to get out of your office or out of the building altogether. To learn about your customers, both internal and external, you have to talk to them and observe them. Evans says to see yourself as the Jane Goodall of your industry, observing through the mist your customers' authentic behavior and note any clues to what your patrons need and want.

Once you've isolated needs, keep your focus on maintaining small cycle times when both articulating and testing assumptions—never invest significant time and energy in a solution until you've validated your approach through direct feedback. When creating solutions, invest efforts in your minimal viable product (i.e., the smallest amount you can release with value), and be sure to do an entire loop of the "build, measure, learn" cycle before you start scaling and amplifying efforts and investments. Again, your primary goal is to maximize your learning and minimize your cycle time.

Your lean mission, if you choose to accept it:

- Explore and get out of the building to understand your customers and their problems.
- Put together an idea of a solution, and pitch it to your customer base to see if it resonates.
- If it does, solve the idea by hand and get some feedback on your solution.
- Incorporate the feedback into a small prototype of the solution.
- Step back in to the cycle of build, measure, and learn all over again.

Even those who don't build and create prototypes can go lean, because they can easily apply the principles of lean analytics to something much less concrete, like user experience. Instead of "learn, measure, build," see it as "think, make, check." As with "learn, measure, build," focus on keeping your cycle times short—we're talking weeks and days, not months or years. Train your attention on people and their needs, keeping things as simple as possible. Follow the information scent, be sure to make all your actions reversible, and give users a way to provide feedback. Throughout your cycles, take care to use technology as intelligently as possible and respect all ways to deliver value, not just those you deem superior.

So let's get to envisioning a better future and finding a way to close that gap. Along the way, no matter who you serve or what your products and services are, always remember to define your problems correctly. Never try to suggest a solution in a problem statement. Evans points out that when you're thirsty, your problem isn't that you lack a water bottle; your problem is hydration. We all have self-imposed constraints and assumptions, and the best solution is usually found somewhere outside of those limits. Once you've defined your problem, avoid immediately converging on a solution. By exploring and testing a variety of solutions, you increase the probability that you actually find something along the way that solves the problem effectively.

In today's ever changing legal landscape, let's remember that automation creates an opportunity for value creation. Look outside the building and think outside the box for new perspectives on problems and new approaches to converge on solutions. Let's try to overthrow our ideas rather than defend them and resist falling in love with our perspectives and solutions. As Evans says, "As soon as you're in love, you're anchored to your old way of thinking."

We are not the customer, and not everyone uses technology or sees the world the same way we do. Even as librarians, we're a diverse group and our interests, preferences, and views vary wildly. Much as we recognize, appreciate, and understand our own diversity as a professional so much more clearly coming together at a conference like this than when we're glued to our computer screens and our endless to-do lists, we'll never understand our patrons just sitting at our desks either. The ideas we have inside us and on our lists right now are still just stepping stones. Until we walk outside, see who our customers are and start experimenting and learning from our results, we'll never be able to truly begin reinventing ourselves as a better, stronger, faster version of ourselves within our profession!

To learn more about lean analytics, Evans recommends *Lean Analytics: Use Data to Build a Better Startup Faster*, by Alistair Croll & Benjamin Yoskovitz.

Program Report

"Are People Even Using This Database?": e-Resources and Statistics (Program A4)

Katie Dunn
University of Wisconsin Law Library

Anna Lawless-Collins (Boston University) gave an overview of e-resource usage statistics, described how her library uses statistics, and presented the results of a survey she and Stefanie Weigmann (also at Boston University) conducted on American Association of Law Libraries (AALL) members' use of statistics. The presentation was followed by a panel discussion of e-resource usage statistics issues. Panelists included e-resource experts from academic law libraries, publishing, and a consulting firm.

Lawless-Collins began by describing why e-resource usage statistics are important and how librarians can use them. When library budgets are flat or shrinking, assessing the value of e-resources becomes especially important throughout the e-resource lifecycle. Libraries use statistics to determine the best use of resources and to help communicate the value of the library and library resources to external stakeholders. This begins with the consideration of the availability of statistics when making purchase decisions. When deciding whether to renew or cancel a resource, it's crucial to be able to determine the value it provides to your users, especially in comparison with other resources. However, comparing statistics across resources can be difficult or impossible, depending on what type of statistics the resources offer. Respondents to the Boston University survey were most frequently using e-resource usage statistics to justify renewals (89%), review their collections (62%), and determine cost per use (40%).

Lawless-Collins presented four types of e-resource usage statistics: Counting Online Usage of NeTworked Electronic Resources (COUNTER)-compliant statistics, vendor-defined statistics, self-generated statistics, and no statistics. I found the four types to be an extremely useful way to think about the variety of statistics that are available across different library resources, and I appreciated the realistic inclusion of "no statistics" in the list.

COUNTER-compliant statistics are considered the ideal for many types of e-resources. COUNTER precisely defines how users should define and present statistics, and it provides "consistent, credible, comparable" statistics across different e-resources. COUNTER statistics are also useful in providing a longitudinal view of usage for a single resource. The reports are easy to retrieve and manage. The Standard Usage Statistics Harvesting Initiative (SUSHI) provides a way to automatically retrieve COUNTER-compliant statistics from a vendor and enter them into local electronic resources management (ERM) systems.

Vendor-defined statistics are any non-COUNTER-compliant statistics where the information provider determines what statistics to provide and how to collect them. This can include hours used, document touches, documents viewed, or types of information similar to those provided in COUNTER reports. Each vendor can define a similar sounding category differently, so it's important to understand what the numbers actually represent. Most legal information vendors that do provide statistics provide vendor-defined statistics. Many survey respondents don't trust vendor-defined statistics—they often seem to overcount or undercount usage. Survey respondents also reported difficulty obtaining statistics from some vendors when the information was not available on demand through an administrator site.

Self-generated statistics are any statistics that are generated by the library instead of from a vendor. They can supplement or substitute for COUNTER-compliant or vendor-defined statistics. Some sources of self-generated statistics are proxy logs, link-resolver statistics, discovery-layer statistics, and Google Analytics. Libraries should consider the costs versus benefits involved in gathering self-generated statistics, as they often require time, technical expertise, and/or money to implement. Commercial solutions like Onelog, Priory Research Monitor, and MPS Insight provide very good statistics for non-COUNTER-compliant resources, but they can be very expensive. They are a better fit for law firm libraries rather than academic or government law libraries because they are browser-based and need to be installed on each user's computer or device.

No statistics: If no usage statistics are available, libraries can gauge use of a resource by pulling information from other sources, such as reference statistics (referrals to resource), circulation statistics, document delivery, and word of mouth.

Boston University manages e-resource usage statistics by gathering statistics at the time of review for each resource. They compile statistics longitudinally from year to year and store them in the directory of evaluations, along with notes about how they collected the statistics and their limitations. They use Excel to compare cost per use data using bubble charts, which allows them to pull different sources of information together. The reviews also include qualitative information that complements and contextualizes the statistics.

Lawless-Collins offered some additional tips on comparing usage of different resources:

- When looking at time-spent statistics, consider whether the time is reported in one lump per period or whether shortest, longest, and average times spent are available. Another important consideration is the length of a session before it times out.
- Compare different kinds of statistics for a more complete picture, but beware of double-counting data.
- It can be useful to look at usage in terms of trends up and down, in addition to raw numbers.
- Low-usage or high cost-per-use resources may still be valuable. Consider their role in the collection and whether they have small numbers of heavy users.

Lawless-Collins recommends looking at the Technical Services Special Interest Section's (TS-SIS) *Accessing Usage Reporting by Legal Database* (http://www.aallnet.org/sections/ts/Resources/Best-Practices/Metrics/Legal-Database-Usage-Reporting.html) when determining what usage statistics are available for a particular vendor.

The survey suggested some possible next steps for both vendors and AALL. Survey respondents were interested in increased availability of COUNTER-compliant reports, more detailed statistics, administrative tools for retrieving statistics, and more incorporation of usage data tools in integrated library systems (ILS) and discovery layers. Respondents would like vendors to work with libraries to establish best practices for providing the information they need. AALL could advocate for COUNTER-compliance with vendors, provide more information on usage statistics, or form a working group and ask for vendor input.

Panel discussion

Can you talk about your use of self-generated statistics?
Tim Devin (New England Law | Boston) reported that they use web access management (WAM) proxy statistics both for databases with and without available vendor statistics. WAM statistics are not great, but they are better than no statistics. They are a good supplement to vendor statistics that seem unrealistic (such as a resource that consistently returns 3,400 uses per month year-round). Devin noted that if you pester vendors who don't provide statistics, then sometimes they will come through eventually.

Why is supplying statistics so hard for some vendors? What is the AALL Committee on Relations with Information Vendors (CRIV) doing in this area?
Jacob Sayward (Fordham University, CRIV Chair 2015-2016) responded. He stated that legal information vendors have a different customer base than many academic information vendors—including many law firms, instead of just academic institutions. Law firms have different concerns than academic institutions, including a high priority on security and privacy, but perhaps less on statistics. Legal information vendors also have different kinds of products—legal research products are structured differently than other library e-resources, and legal resources have different publication patterns. These are real reasons why it's difficult for legal information vendors to provide statistics, but they are also ready-made excuses. It's our job to continue telling vendors that statistics are important to us. CRIV has done the pestering, but could do more partnering with vendors in the future. However, in the last year, CRIV has had calls with four major vendors, and statistics were a part of each of these conversations. Tell CRIV this is important to you, but don't wait for CRIV to solve the e-resource statistics problem for you.

What statistics is Hein able to provide, and how do you generate those statistics?
Daniel P. Rosati (William S. Hein & Co., Inc.) stated that Hein uses their server logs to provide vendor-defined statistics. He got a laugh out of the audience by defining vendor-defined statistics as "[statistics] we made up ourselves, but we're not making them up." Hein provides summary statistics by month on hits (clicks in the resources), article requests (downloads

or when an article is read online), page views, visits (sessions), and searches performed. He encourages people to sign up for the customer web portal. Hein can also can provide statistics via email, monthly or by request.

How do you use usage information to negotiate supplier agreements?
Kris Martin (HBR Consulting) encourages people to first think about value. You can start with cost per use, but does that really tell you what the value is, especially when comparing resources? Statistics are just numbers—you need to use them to tell a story. Could usage going up or down for the last few years of a contract be the result of platform changes, users needing more training, or competing products? You may be promoting it differently, or you may have had a change in your users' demographics or research focus. Changing where a resource is on a webpage can dramatically change usage. On the vendor end, is the data measured the same way? Using qualitative information along with quantitative will allow you to form a theory and test it before talking with your vendor. You want to be able to make a case with the story you're telling. Martin also talked about the trend toward microdata in usage statistics. HBR is a consultancy exclusively serving law firms and law departments, and they have a lot of experience with the data inside legal libraries. They love getting down to per user, per database, per session viewpoints, but the more micro/granular you get with the data, the less credible the information. When you collect more granular data, make sure you and the supplier have a shared understanding of what that data means.

How do you pull and maintain statistics?
Tim Devin (New England Law | Boston) prepares statistical reports three times per year. The reports inform renewals and budgeting, and they use them to provide feedback to reference staff on what they might want to promote. He stores all the data in a massive spreadsheet and uses it to compare across years. He cautioned that in an academic institution, enrollment fluctuates. It's not fair to compare two years of a database with a dip in second year if there are fewer students that year. He also noted that differences in database functionality can impact statistics. Consider a comparison of number of searches in a database with a really good search system with one that requires a lot of refinement to find your document. If the second one averages 14 searches per session, maybe it's not that great of a database.

What do you wish vendors would do differently?
Jacob Sayward (Fordham University) feels that there are two important things: First, COUNTER should be a floor, not a ceiling. Some vendors provide both COUNTER statistics and vendor-defined statistics, and the vendor-defined statistics are actually wonderful. With the development of demand-driven acquisition and evidence-based acquisitions programs, vendors are collecting more usage data. Libraries want access to this, too. Push your vendors, don't just settle for COUNTER data. Second, vendors should understand how important usage statistics are as part of the total package of products and services they are offering. Usage statistics are an important part of the product, and they are worth putting resources into. This is part of what we're paying for and part of what we might be willing to pay a bit more for.

What do you wish librarians knew about statistics?
William Shannon Hein (William S. Hein & Co., Inc.) responded that expectations librarians have of vendors have changed over time. In the early days of HeinOnline, they provided archive content of law journals pre-1925, then libraries wanted content up to 1980, then up to most current issues, then searchability, then usage statistics, then COUNTER-compliant statistics. Hein keeps evolving and changing in order to meet the needs of libraries, but there are some barriers.

Hein reported that Hein & Co. spent a large amount of money in the past five to ten years to discover that they can't become COUNTER-certified. He described several reasons why COUNTER isn't the best fit for Hein's content:

- A COUNTER Journal Report 1 (JR1) requires the journal's digital object identifier (DOI), print ISSN, and online ISSN. ISSNs only started in 1975, and HeinOnline content goes back a couple of centuries. Those numbers don't exist, and because Hein is just the aggregator, not the publisher, they can't apply for those numbers. The publishers themselves have to apply for them. Some of them don't exist anymore, and some don't follow those standards. Theoretically Hein could provide a JR1 or COUNTER statistics for 1980 content forward in HeinOnline, but that would omit the vast majority of the content that's in the database. Hein tends not to break down statistics by individual titles. They have more than 2,200 journal titles, for instance. Breaking those down by title wouldn't be that useful. There aren't different journal packages—every year Hein adds 150 new titles and updates the other titles in the database, and that's the package. They try to give libraries a large amount of content for a small amount of money.
- He also stated that it is sometimes hard to compare apples to apples with HeinOnline, because their statistics would be competing with statistics other commercial vendors are providing. While 94-95% of content in HeinOnline is current up to the most recent content, commercial publishers will often impose an embargo of several years and provide the most recent content only on their own platform.
- Sheer size of the reports is a problem, and content present in multiple modules complicates the recording of statistics. There are over 80,000 publication titles in HeinOnline, and often content is present in more than one library module.

For example, a journal in the HeinOnline Law Journal Library may also be included in a subject-area collection, but it still "lives" in the Law Journal Library and will have its usage recorded there.

- Besides the full-text content, Hein has a lot of indexes and metadata (AALL Index to Foreign Legal Periodicals, National Survey of State Laws, etc.). It's difficult to record usage for those.
- Hein provides its metadata to discovery vendors like EDS, but if you're searching through the discovery vendor, then HeinOnline will not record those searches. Page views or article requests are only recorded when you click through to a result in HeinOnline.

W.S. Hein reiterated Hein & Co.'s continued commitment to providing quality usage statistics. He said that they will keep watching COUNTER's development, as future generations of COUNTER may be a better fit for Hein's resources. He encouraged customers to sign up for the customer portal to download statistics or contact them to receive emailed statistics.

What programs do you use for visualization of usage data?
Kris Martin (HBR Consulting) is a long-time fan of Excel. You can do a lot with Excel, but for the last five years or so, HBR has made greater use of other analytical tools such as QlikView, Tableau, and Google Analytics. These tools emerged in response to the expansion of big data. People started with Excel. Then people started creating relational databases using tools like Access or SQL. These allow you to use common identifiers across datasets (like user IDs) to bring information together into reports. The challenge with these tools is that they're more and more complex. When more and more data became available, people began using tools like QlikView, Tableau, and Google Analytics to make it more accessible.

The beauty of these tools is that they can bring in information from anywhere. Folks at Hein made the point that COUNTER is great, but there is also information beyond COUNTER. You want to bring all this information together in one place: COUNTER statistics, vendor-created statistics, ResearchMonitor or OneLog information, financial information from accounts payable, demographic information from human resources, metadata out of your contracts, ILS, survey information, etc. It takes some time at the outset to create these things, but once they're established and data is being fed in, you can access the data any time instead of just compiling everything twice per year. You gain more time to think about what the information means rather than using that time just to manipulate the data. One of HBR's clients recently implemented something that saved them 20 hours per week and gave higher-quality outputs. It enabled them to easily present information differently to different stakeholder groups.

There's often apprehension about the costs of these tools, but other groups in your organization might already be using one of these platforms. Often there is an upfront cost to engage with a supplier, but after that it's a relatively inexpensive license fee, so it may not cost that much for your library to pay for one seat. Alternatively, talk to an integrator, who may be able to host in order to bring down the cost. Suppliers will often provide some free functionality to let you get your feet wet.

Questions from the audience

If COUNTER isn't the answer and bringing in all these statistics to one space is, what is the best way to do this? If you're a vendor and you can't become COUNTER-compliant, what might be a better model for statistics for law content?
William Shannon Hein (William S. Hein & Co., Inc.) feels that vendors can and should be providing some kind of usage statistics. He says it would be great if publishers could agree upon alternative metrics when COUNTER isn't a good fit, but they haven't had much luck engaging other publishers in discussions around this. He encouraged libraries to demand usage statistics from their vendors that are meaningful and comparable, even if they aren't COUNTER-compliant. Some vendors may have more usage statistics than they are willing to share with customers.

You mentioned Wolters Kluwer—do they give you statistics? I have asked for statistics on IntelliConnect, but I consistently get the brushoff.
William Shannon Hein commented: No, they don't give us statistics, but by them giving us content, we can measure their content when you access it in HeinOnline in the same way as we're measuring other journal content in HeinOnline. Other audience members said they've not been able to get statistics from IntelliConnect, either.

An audience member commented: "Thanks to Hein for being here and for providing consistent statistics. Even if they're not COUNTER-compliant, you consistently provide usage statistics, and I value that highly."

Lately when I've been doing my usual request for usage statistics, after spending many years trying to get suppliers to give us IP authentication, they're now coming back to tell us they can't provide usage statistics for IP-authenticated licenses, only for username/passwords. This is a new excuse I've encountered this past year. Is this just an excuse or is there a technical thing?

Jacob Sayward (Fordham University) replied that it's mostly just an excuse. It's true that Internet Protocol (IP) authentication can't tell you as much about the individual type of user that used this particular type of data at this time. But many other vendors provide usage statistics for IP-authenticated resources. So, what resistant vendors are saying is that something about our system makes this too hard, we're not willing to invest the money in it, and we're not afraid enough of you cancelling to make that investment.

Kris Martin (HBR Consulting) suggested that the best time to negotiate usage statistics is when you're negotiating a purchase. That's when you have leverage, and price is not the only thing that is on the table. This is really just another service level.

Final comments on the program

E-resource usage statistics is a valuable and actionable topic, and the presentation/panel format offered plenty of useful information for both attendees new to e-resource statistics and those refining their library's existing use of statistics. The survey results were an interesting peek into the current state of practice for e-resource statistics in law libraries, and the forthcoming article presenting the full survey results will be worth seeking out. The audience appreciated the candor and humor of the speakers, and the range of expertise on the panel made this an especially interesting and informative hour.

Handouts for the program (a presentation outline with a bibliography, an infographic summarizing the results of the survey, and a flowchart of e-resource usage statistics options) are available on AALL2Go, along with a recording of the program.

Program Report

Harvesting Democracy: Archiving Federal Government Web Content at End of Term (Program A7)

Michael Maben
Indiana University, Bloomington

As we anticipate the election of a new president this November, there are agencies and institutions preparing for the change of administration and the archiving of federal government data. This program featured individuals representing three of those partner institutions charged with archiving that web content.

Abigail Grothe (Library of Congress) spoke of the goals of the End of Term (EOT) project and the cooperation of the partner institutions, including Internet Archives, Library of Congress, University of North Texas Libraries, California Digital Library, and the Government Publishing Office. These agencies have distributed the work with no outside funding (just institutional support). They are looking at more than .gov websites—defining the "governmental web presence" is hard because some sites are .com and .edu.

The next speaker was Jefferson Bailey (Internet Archives), who stated .gov websites proliferate like invasive species, including some that are not public or are unlisted. Bailey said within the federal government, there is the issue of "web waste" and preservation mentalities, which was highlighted in 2011 by the White House initiative "Too Many Websites" (https://www.whitehouse.gov/blog/2011/06/13/toomanywebsitesgov). The California Digital Library (http://eotarchive.cdlib.org) hosts the archive for the EOT project.

The third speaker was Mark Phillips (University of North Texas Libraries). He shared statistics comparing the EOT projects from 2008 to 2012. For example, 83% of the PDFs in 2008 were not found in 2012. Top-level domains increased from 241 in 2008 to 251 in 2012. A number of his charts and statistics are available on his webpage journal at http://vphill.com/journal.

Jefferson Bailey then returned to the podium and discussed how they need to capture approximately 100 terabytes (TB) of government data, and he stated they are looking for more partner institutions. Abigail Grothe stated that partners so far include George Washington University Libraries, Stanford University Libraries, and the Federal Government Web Archiving Working Group (http://www.fdlp.gov/all-newsletters/featured-articles/2348-the-federal-web-archiving-working-group).

Finally, Mark Phillips closed by discussing the plans for 2016. There is a nomination tool to recommend which sites they should crawl and save. He stated any and all nominations are welcome and help is needed, especially with:

- Judicial branch,
- Social media,
- .gov content on non-.gov domains (.com; .edu, etc.), and
- Important content on subdomains of large websites.

The nomination tool is available at http://digital2.library.unt.edu/nomination/eth2016.

The tagline for the EOT project going forward is:

- Crawl it all!
- Access it all!
- Preserve it all!
- Join in the Fun of it All!

Program Report

Promoting the Value of Technical Services Librarians at Budget Time: Practical Advice for Directors and Managers (Program B3)

Jacqueline Magagnosc
Cornell Law Library

The program began with a series of questions for the audience:

- What types of institutions are represented here today?
- How many are responsible for budget planning?
- Who in the audience has had to defend their tech services personnel budget or expenditures within the last three years?
- How many have seen their tech services staff be reassigned or have the positions eliminated within the last three years?

Jean Pajerek gave the first formal presentation of the session, "Technical Services: Cost Center or Value Delivery System?" Pajerek started her presentation using the example of one's experience staying at a hotel. In her scenario, all interactions with the staff are positive, but the sheets are dirty. The work of housekeeping—staff that are not visible—has a big effect on your experience. Technical services is like infrastructure; the better we do our jobs, the less visible we are. Access to library materials is non-negotiable. It is easy for administrators to calculate the costs associated with technical services, but it not easy to measure and articulate the value technical services departments create and deliver. They can outsource some tasks associated with technical services work, which is always attractive to administrators.

Pajerek suggested we need to change the conversation; what can we learn from the corporate world? She also suggested we need a value proposition for the work of technical services. A value proposition is a positioning statement that explains what benefit you provide for who and how you do it "uniquely well." For technical services, we should center these statements on: (1) what patrons need or a problem we can solve and (2) the value we can deliver by meeting that need. For example, consider the following:

What is your product or service?
Who is your target audience?
What problems do you solve for them?
What value do you provide?
How do you do it uniquely well?

State the benefits in the user's language. Differentiate your service. What's in it for them?

Pajerek provided some sample value propositions. One was for a rush book ordering service. The target audience for this service is law school faculty. The statement reads, "A new book on your research topic has just been published and you need it fast. Skip the hassle of recalls, interlibrary loan, and long delivery waits. The Law Library offers two-day purchase and delivery service, right to your office door!" In this case, Law Library Information Management offers a service that the university's main library does not, reinforcing the perceived value of the unit. A second proposed value statement was for an institutional repository: "A large percentage of the world's scholarly output is locked behind paywalls, where it is inaccessible to those who cannot afford to pay. Our repository provides global open access to your scholarship, leveraging the Law Library's expertise to give your scholarship professional duration and broader exposure worldwide." Development of value statements provides an opportunity to assess departmental priorities, clarify which services are more or less valuable, and identify those that might be candidates for discontinuation. Thinking about these issues will help your department be better prepared to justify services at budget time.

Steve Lastres addressed the topic of promoting the value of technical services in the context of firm libraries. He prefaced his presentation by reminding the audience to not focus just on user's needs, but also on the needs of the organization. Organizational alignment equals buy-in. How are you providing value to end users completing the work of the organization? Strategically, what makes sense? What products can you deliver to clients to make them more efficient?

At Debevoise & Plimpton, the library partners with vendors to provide services. One example is DebMobile, a platform for lawyers to access the tools they use. Because of security issues, the service is made available outside of the firm's network so associates can "actually do their work." A librarian acted as a "concierge," getting the app onto each associate's mobile devices. Users do not understand the complexity of this service, which is based on an Application Program Interface (API) with human resources tailored to practice areas. Lawyers are able to use the app on multiple devices, which enables them to work smarter in spite of security limitations. The library never mentions that there are bibliographic records behind the app. Another service is DebIntel. This service started as an aggregation tool providing a daily e-mail tailored to each associate's needs, and it developed into a current awareness dashboard updated in real time throughout the day. Again, the library worked with a vendor to create the service. It is not directly embedded in the firm's intranet, but it provides seamless authentication with no barriers to access, which enables lawyers to get instant updates with links to full text. DebIntel is now being resold to other firms. Yet another service, Ozmoysis, is an API integration with the firm's online catalog providing RSS (Rich Site Summary or Really Simple Syndication) feeds. The service organizes resources into "buckets" that make sense to users (practice group, jurisdiction, client teams, etc.). This initiative shows value by saving expensive time. Libraries need to re-think what is important. Lastres stated that vendor partnerships are important because the library does not have the information technology (IT) resources to do everything it wants.

At Debevoise, they changed the definition of technical services and concentrated on addressing pain points for attorneys. For example, they save passwords on the backend of the apps. Associates appreciated the usefulness of being able to get at their current awareness no matter where they are. The library saved an enormous amount of time on the backend—the large amount of work associated with passwords.

Camilla Tubbs spoke to the importance of balancing qualitative and quantitative information at budget time, based on her experience as Assistant Dean for Library and Technology at Thurgood Marshall Law Library, University of Maryland Law School. In academic law libraries, deans can see metrics that do not say anything about the services libraries provide. Keep in mind that administrators do not care about many of the metrics we keep, but it is important to have to have all the information at your fingertips. Projects such as ALLSTAR (Academic Law Libraries: Statistics, Analytics and Reports) Benchmarking and the American Bar Association's annual statistics enable comparison between peer institutions. Costs are measurable data, and administrators are interested in what they can do to balance the budget. Tubbs recommends going into the budget process thinking in terms of evaluating the administrator's goals. Keep in mind that libraries cannot quickly recoup money because we are tied into contracts; print cancellations take time.

Tubbs suggests changing the narrative of the library: how can you help achieve cost savings and transition to the library of the future? Technical services staff are essential to creating this future library. Recently, there was a discussion on the American Association of Law Libraries' directors list about adding electronic resource records. To do this, the library needs staff who both know how to download records and to evaluate if the records are correct. Libraries need staff who can evaluate if a product is a reasonable/reliable replacement. Forward-looking libraries need the resources of a technical services budget. Focus on end goals. Be sure your technical services department is not just "managing the card catalog." In addition to new roles and workflows, focus on what makes law librarians distinct from other librarians. Be able to answer the question, "Why can't we just consolidate the technical services departments?" Be able to explain the value of what law librarians do, without using jargon. Examples of newer roles include technical services librarians managing/curating the library's digital repository, focusing on the importance of putting faculty scholarship online and tracking its impact. Another role is digitizing specialized local collections. For example, the University of Maryland digitized Francis King Carey's papers, which included getting the Carey family to pay for the project, including staff salaries. When all else fails, explain the law library as an ecosystem; you need the whole thing to make it work. Without technical services librarians, eventually you will not be able to find anything!

The speakers at this session delivered consistent takeaways across their differing perspectives. They emphasized the importance of aligning technical services priorities with institutional priorities and being able to demonstrate how your department meets the needs and mission of your organization. Remember that traditional technical services metrics do not resonate with administrators; describe your services and sell the value of your work in their language. Position your department's services in terms of the future, not the past.

Program Report

Creating the Future of Discovery and Research: BIBFRAME 101 for Library Directors (and Everyone Else) (Program C5)

Linda Wen
American University Washington College of Law
Pence Law Library

This theory to practice session turned out to be a quite practical one with a Bibliographic Framework Initiative (BIBFRAME) pilot progress report followed by a demonstration of the linked records of Denver Public Library, the first library that translated its MARC data into BIBFRAME. Even though the speaker from Denver Public Library was not able to share the library's experiences in person, it was still exciting to learn that BIBFRAME is really on its way.

Paul Frank, the BIBFRAME profiler, started the presentation by describing the role BIBFRAME would play in the transition from the legacy MARC-based environment to one fully integrated with the web. Among all the benefits of Linked Data he mentioned, it's worthy of note that, because controlled identifier links will replace traditional MARC-controlled text strings, there will be a huge amount of savings to the time and costs associated with traditional authority control as well as cataloging. The language-neutral controlled identifiers will open the world community to the wealth of authoritative bibliographic data. The library data will then be "not just on the web but part of the web."

Paul stressed BIBFRAME was not a production database nor an integrated library system (ILS), but a set of tools intentionally designed for easy use. There was no change in cataloging standards with BIBFRAME cataloging nor was there "back end" to be concerned with, even though comprehensive knowledge of *Resource Description and Access* (*RDA*) is useful. Paul also reported on the accomplishments and lessons from the six-month (August 2015 – March 2016) Phase 1 of the BIBFRAME pilot project. In Phase 1, they converted 13.5 million MARC bibliographic records of six formats. As a result of Phase 1, they further evaluated and improved BIBFRAME Profiles and the MARC to BIBFRAME conversion specifications. To finalize BIBFRAME Editor, Library of Congress (LC) will commence Phase 2 of the pilot project, during which they will test records of more formats including serials and electronic resources, expand vocabularies from external partners, and improve the mapping of *RDA* to the BIBFRAME Work/Instance dichotomy.

Karen Selden and Paul briefly demonstrated the linked records as the result of the BIBFRAME implementation project at Denver Public Library (DPL). DPL signed on to the LibHub Initiative in August 2014 with Zepheira, published "Molly Brown Papers" data as an experiment in January 2015, and converted its entire bibliographic data into BIBFRAME in April 2015. Now a Google search for "Molly Brown Papers" will return a link on the top to the bibliographic record in DPL's WebPAC. Currently, Internet searches for "title - Denver Public Library" land on an intermediate page at labs.libhub.org; however, the library data are now pushed out onto the web at the level of individual records.

Paul Frank highly encouraged the librarians to explore, investigate, run, and experiment the BIBFRAME Editor and the data from Phase 1, which is fully open to the community. There are abundant training materials on the BIBFRME website. I would like to conclude this report with what I overheard during the presentation: "Future of search and discovery; sometimes you get exactly what you want right now from that Google page, sometimes you don't, but certainly this is better than what we've got now."

Program Report

The Once and Future Presidential Library: From Lincoln to Obama (Program D9)

Michael Maben
Indiana University, Bloomington

This entertaining and informative program discussed the presidential libraries, focusing on President Obama, whose presidential center and library will be located in Chicago, and the State of Illinois' Abraham Lincoln Library in Springfield.

The first speaker was *Chicago Tribune* architectural critic Blair Kamin, and he titled his talk "Beyond the Pyramid Syndrome: America's Presidential Libraries." He chose this title because he refers to these libraries as America's pyramids—imposing buildings honoring the individuals without revealing their weaknesses. His major question was how they can better serve the librarians and scholars by supporting scholarship and research.

There are currently 13 presidential libraries administered by the National Archives and Records Administration (NARA). Kamin stated while Franklin Roosevelt's uses Dutch architecture and looks like a house, both Truman and Eisenhower's look like reduced versions of a temple. Beginning in the 1960s, uniformity goes away—Democratic presidents (Kennedy, Johnson, and Clinton) sought a modernist, imposing form, while Republican presidents have strived for a more traditional look. At the time of the Annual Meeting, the Obama Foundation was considering two sites on the south side of Chicago, one in Jackson Park (near the Museum of Science and Industry) and the other at Washington Park (a more distressed neighborhood). In late July after the Annual Meeting, the Foundation announced the Obama library will be built on the Jackson Park site. The architects, New York-based husband and wife team of Tod Williams and Billie Chen, are modernists, and their designs reflect that view.

The second speaker was John Laster from the National Archives, and he titled his talk "Accessing Barak Obama's Presidential Records." The NARA Presidential Library system was created in 1941 under President Franklin Roosevelt. President Nixon's plan to destroy audiotapes led Congress to examine the ownership of presidential records. The Presidential Records Act of 1978 (44 USC 2201-2209):

- Established public ownership of presidential records,
- Codified the definition of presidential records, and
- Transferred legal custody of presidential records to NARA.

Five years after the end of an administration, the records become subject to the Freedom of Information Act (FOIA) with a number of exceptions, including items related to national security, trade secrets or commercial information, and geological information related to wells. NARA takes possession of the textual files, gifts, and electronic records. Comparing the last three presidents, the Clinton Administration had 78 million pages and two terabytes (TB) of data, while the Bush Administration had 62 million pages and 82 TB of data. NARA has not projected how many pages will come from the Obama Administration, but they anticipate there will be approximately 200 TB of data. Laster said that NARA is using technology to solve the problem of managing and accessing the data, including advanced searching techniques, identification of duplicates, content understanding, and machine learning.

The third speaker was Olivia Mahoney with the Chicago History Museum, who spoke about "Rethinking Lincoln." She felt the Lincoln portrayed at the Lincoln Museum and Library in Springfield was appealing but disjointed and sanitized. She curated an exhibit there, attempting to show the evolution of Lincoln's thinking concerning slavery over the course of his political career. She did this through the examination of five significant speeches:

- House Divided, June 16, 1858: The nation, divided by slavery, must choose its course.
- First Inaugural Address, March 4, 1861: The war is not for emancipation.
- Gettysburg Address, November 19, 1863: Lincoln's views on slavery have changed dramatically.
- Second Inaugural Address, March 4, 1865: Lincoln states slavery caused the war.
- Speech on Reconstruction (Last Public Address), April 11, 1865: Lincoln supported full voting rights for emancipated black men. Three days later, Lincoln was assassinated.

Mahoney stated Lincoln's legacy is defined by three amendments to the United States Constitution: 13th (outlawing slavery), 14th (defining citizenship), and the 15th (establishing voting rights to former male slaves or black men). She concluded her talk by stating it is hard to avoid getting caught up in the myth of Lincoln.

This program was an excellent discussion of presidential libraries and challenges of architectural design, collection of records, and presenting the history and legacy of presidents.

Program Report

Sustainable Planning for a Digital Repository (Program E4)

Thomas Ma
Harvard Law School

Hollie White, Duke University School of Law, stated as part of the planning for a repository, it is important to understand the culture of the institutions, which includes faculty, students, and staff. As repositories are constantly changing, staff must consider which content to maintain. Regarding the content of repositories, one should consider—in addition to scholarship online—access to other resources, such as streaming. Statistics, metadata, and preservation are important components of the sustainability of a repository. Statistics are more than just metrics; they provide a way to build conversations with stakeholders about what to collect in the repository. People often forget about metadata, but metadata contributes to findability and downloads. The introduction of Library of Congress Subject Headings (LCSH) in addition to keywords contributed to an increase of downloads from Duke Law's repository. On the topic of preservation, Hollie talked about Digital Commons, Amazon S3, and LOCKSS (Lots Of Copies Keeps Stuff Safe) as options for long-term curation. Regarding repositories, Hollie exhorted us to “Evaluate, Ask, Reconsider, and Question.”

Nick Szydlowski spoke about his experience setting up the Boston College Law School’s repository with little resources or guidance. The content of the repository encompasses faculty webpages, faculty annual reports, information belonging to the law school administration, and faculty publications and activities. One key rule about repositories Nick highlighted was the need to plan for future migrations. It is certain, according to him, that the collection of the law school’s repository and repositories in general will be moved at least once. Regarding preservation, Digital Commons and LOCKSS are two digital preservation tools he recommended. For assessments, download counts and annual reports are good means for evaluating success. Nick also stressed self-evaluation and looking at one’s role in the community. Staff plays a very big role and need to make decisions about copyright, preservation, and marketing, for example. He encouraged letting staff have the freedom to learn and become experts.

Amy Buckland, University of Chicago, described how she set up a repository from scratch. Planning includes asking what kind of repository, top-down or bottom-up approach, and whether the institution really needs a repository or if there are other options. Other questions include who is the audience and what to include, especially given that some material may be sensitive for certain groups. Sustainability entails continuing the investment in the repository by finding financial resources and finding people with metadata and other skills. Some questions include how long to keep content and preservation. Like Nick, Amy also stressed that it is likely that the repository content will migrate to another platform at least once. On the subject of assessment, one should not look at downloads and page hits as the only metrics. Communication with the institution’s communities and their changing needs is also important. Lastly, Amy addressed the need to determine when the repository is in maintenance rather than development mode and when to “kill off” the repository and look for other options.

Whether one works with a pre-existing repository or builds one from scratch, we learned from the three speakers the key concepts for a successful digital repository are planning, sustainability, and assessment. Other important elements include having good staff, good metadata, and good communication with the respective communities.

Program Report

Hot Topic: The Future of Our Digital Memory (Program E7)

Georgia Briscoe
University of Colorado
William A. Wise Law Library

Sheri H. Lewis (University of Chicago D’Angelo Law Library Director) coordinated and moderated this thought-provoking program, in which Abby Smith Rumsey highlighted her recent book titled *When We Are No More: How Digital Memory is Shaping our Future.* Rumsey is a Harvard Ph.D. historian, and her book examines how humanity records and passes on its culture to future generations (from the libraries of antiquity to the excess of information available in the digital age) and how ephemeral digital storage methods present a challenge for passing on current cultural memory to the future. One reviewer said the book examines the “history of memory from caves to computer chips.”

The book is a short treatise on cultural preservation in the digital age. Its goal is to help readers understand how collective memory shapes the future. In the United States, our view of the past is constantly changing because we rely on collective memory to tell us what to expect. In discussing this problem, Rumsey said human beings have “augmented memory” and the people building technologies have no understanding of history.

Howard Rosenbaum, Professor of Informatics and Computing at Indiana University, shared the podium to comment and question Rumsey about her book. He said the book was “a wonderful read—clearly written.” They discussed the moral challenges of technology and why it is so important to preserve it. Rumsey reminded attendees that only humans make choices about the importance and long-term value of information. Who will decide what should be removed from the web? Rumsey said that people should develop policies about usage of web information before they set up websites.

Values are imbedded in technologies. However, users must beware of governments and commercial companies like Apple, Microsoft, Google, and Amazon taking and keeping all data or deciding what to keep or change. Reinterpretation of historical information is not uncommon; Rumsey described examples from the Soviet Union, China, and the former Yugoslavia.

Rumsey and Rosenbaum agreed libraries have an important role to play in preventing cultural amnesia. The old model of preserving knowledge by preserving the object doesn’t work anymore. Now there is exponentially too much information and data. Public institutions must act as stewards of digital assets. The question for libraries had always been: “What can we afford to save?” The question today is: “What can we afford to lose?”

As librarians and historians reconsider memory for an economy of digital abundance, they must be open-minded and not afraid to take strategic detours or sidestep interesting but distracting diversions along the way. Mastering the abundance of memory in the digital age is our task at a personal, social, and cultural level. Rumsey also summarized our tasks into: (1) rescuing the past; (2) rescuing the present; and (3) avoiding cultural monocultures, which is the idea that only one type of information is worth saving.

The problem of outdated technology with unreadable floppy disks, zip drives, and tapes is well known. Rumsey said everyone has to accept loss, but losing the wrong things can be a big problem. She believes libraries should collect more web archives and legal blogs, and she asked whether law librarians should be collecting law faculty Facebook pages.

Some of the memorable quotes and comments from the program included:

- The market economy does not provide for preservation.
- Current copyright law is hurting digital preservation.
- Zealots of free access are important.
- A new kind of preservation may be DNA modeling.
- We are bumping up to Moore's Law.
- Mark Zuckerberg's computer has tape over the speaker.
- Someone's noise is someone else's song.
- We must educate each citizen to preserve/digitize their own data.
- Digital memory is ubiquitous yet unimaginably fragile, limitless in scope yet inherently unstable.
- One of a librarian's roles is to keep history whole.

Program Report

Managing a Legacy Collection: What Do I Do with All These Microforms? (Program E8)

Rachel Purcell
University of Florida Levin College of Law
Lawton Chiles Legal Information Center

This program was well attended and it's no surprise! The question of how to manage your microform collection in a digital age is a common but not easily answered one. However, the collection of speakers from the Charles B. Sears Law Library at the State University of New York (SUNY) Buffalo Law School showed that a well-organized and thorough microform weeding and reorganization project can benefit librarians and patrons alike!

The first presenter, Terrance McCormack, discussed the history of microform and of the University at Buffalo Law Library collection, as well as details associated with their Microform Compression Project completed in 2015. Terrance is the Associate Director and Head of the M. Robert Koren Center for Clinical Legal Education for SUNY Buffalo. For a millennial like myself, the brief history on microform proved very interesting and informative! This recap took the audience through a handful of microform milestones starting with its creation in 1839, to the founding of University of Microfilms International (later bought and rebranded as ProQuest) in 1938, and finally, to the gradual reduction of demand for and dependence on physical media in libraries with the rise of electronic content in the 1990s.

The benefits of microform are well understood. This medium provides compact information storage in human-readable form and generated (at least for a time) in large volume by publishers with a guarantee of preservation. Microform was a type of insurance in a generation unsure about digital databases. The collection at the University at Buffalo Law grew immensely to the point that, in 2005, they were 25th in the nation for largest collection of microform, and in 2008, microform made up half of their physical materials. However, the downsides of microform started to outweigh (literally!) the benefits. The decreased use of the media combined with increasing labor requirements were only the beginning. The weight of the cabinets was so great that a civil engineer had to direct where to place them so as not to compromise the structure of the floor. Aside from the University's issues, microform in general has fallen out of favor for many schools. Publishers have started to move away from microform production. Whether as a direct causal link or just another aggravating factor, standard microform printers and scanners sold by large companies have also declined, which led to the market for replacement parts becoming smaller and more expensive.

All of these changes inspired the program's main focus, the Microform Compression Project. Terrance met with Theodora (Theo) Belniak, Head of Collection Management, in the spring of 2015 to discuss reducing the law library's microform collection to a more manageable size. They formulated a timeline to ensure the project was completed by 1L orientation week in August 2015. There were three options for the existing microforms: (1) transfer to the University Libraries Annex; (2) disposal; or (3) maintain in the law library. The Libraries Annex contains compact shelving perfect to house low-use materials. A good example of resources kept in the library are the microfiche of the N.Y. State Governor's Bill and Veto jackets. They are highly used in legislative history research and only available from the New York State Library. In comparison, the U.S. Supreme Court Records were perfect for the Annex transfer because they are important but low-use material and the Annex holds a multi-format scanner to read the different film, fiche, and microcard formats.

The program's second presenter, Theo Belniak, explained the collection management aspects of the project. She advised, "Collaboration is key!" The cooperation and constant communication between the three departments of technical services, collection management, and the Koren Audiovisual Center proved to be the driving force behind the project. They created a master spreadsheet documenting all of the microform so they could evaluate each title. There were a number of balancing factors in the collection decisions: Is it used? Is it unique to the United States or the East Coast or to New York? Is it owned in another format? Is it used in teaching or research? Is it related to the law? Is it related to the law in the United States or in New York? Is it findable? Is it free in a reliable format?

Once Theo had laid out what seemed like the very laborious task of evaluating each piece of microform, the program's third and last presenter, Ellen McGrath, Head of Cataloging, described the technical services workflows and processes related to the project. This was not the first time the Charles B. Sears Law Library had devised a plan to transfer microform to the Annex. With those procedures from the earlier 2012-2013 transfer in mind, they implemented a system to seamlessly (although not without physical exertion) transport microfiche and film trays from the library to the Annex. They barcoded and entered each item in the library and Annex integrated library system, Aleph. They created a brief description of the first and last fiche on a card, which they put in front of each tray. Conversely, they individually barcoded each microfilm and placed them face up in the tray. Anne Marie Swartz, Instructional Technologist, coordinated with students to complete the withdraw statistics. The withdrawn titles totaled 573, while total units (fiche/card pieces and film rolls) withdrawn totaled 354,720!

The discussion regarding disposal of the discarded microform was also very intriguing. The Hazardous Waste Office at the University's Environmental Health and Safety Department coordinated with the library to remove the boxes for processing and the pickup by an Environmental Protection Agency (EPA)-certified hazardous waste contractor. Ten drums of microforms were incinerated at 1,600 to 2,500 Fahrenheit to destroy any harmful chemicals contained in the film material. The cost for the removal and destruction of these drums of film was about $100 per 55-gallon drum—a minimal cost for the destruction of 2,692 pounds of microform waste.

The project (much like the program describing the process) was a great success. The library saved $2,500 with the cancellation of microfiche subscriptions and 100 hours per month of student and staff time. Between transfer and withdrawal, the law library scrapped ten of their twenty cabinets and freed up space available for repurposing.

Program Report

Metrics: Redefining and Proving Value (Program G5)

David Sanborne
Cook County (Ill.) Law Library

This program was about how choice of metrics can have a large impact on perception of success and, therefore, strategic planning. The presenter was Tim Corcoran of Corcoran Consulting, a firm that provides consulting services to the legal industry, including law firms, law departments, and legal vendors. Firm libraries were the primary focus of the presentation, with a secondary focus on legal departments.

Corcoran began the session by recommending the October 2015 *3 Geeks and a Law Blog* article called "What are the Useful Metrics and Benchmarks for Information Professionals?" (http://www.geeklawblog.com/2015/10/what-are-useful-metrics-benchmarks-for.html). He said when deciding on what metrics to use, it is important to know what you are trying to measure. He argued the saying "you can't manage what you can't measure" would be better phrased as "you can't manage *well* what you can't measure."

He said metrics are a method of showing value. For libraries, the trick is to identify what an organization does to measure performance and how the library can tie into that.

Corcoran explained use of metrics is governed by "fast and frugal" heuristics. Individuals generally make decisions based on what "feels" right. We are now in an environment where we have lots of data, but we don't necessarily have a good understanding of what that data means. A wealth of data enables us to concentrate on the data that confirms our biases.

He pointed out organizations consistently use the wrong metrics, focusing on backward-looking data rather than data they can use to predict future performance. Choosing the right data is crucial and has a major impact on the message communicated.

At this point, Corcoran asked the audience for examples of metrics used by law departments. He described how well these metrics fit in a forward-looking environment. He emphasized it is important for departments to ask themselves what it is they need to know. He recommended that departments use dashboards and balance scorecards to compare metrics and goals across the organization. While acknowledging balance scorecards are no longer as “in” as they were a few years ago, Corcoran argued they are still one of the best tools available for comparing large, diverse datasets.

He then polled the audience on what metrics law firm libraries use. One metric he explicitly mentioned was diversity footprint. He argued having a diverse workforce provides an economic benefit to organizations because (1) it makes them more flexible and (2) a high degree of diversity enables the organization to adapt to different client environments more efficiently.

Corcoran claimed current metrics generally focus too much on short-term financial health and are “lagging indicators.” They don’t reflect long-term potential and can only reflect completed projects. The future is toward indicators that predict future performance and a focus on long-term financial success. He identified internal client satisfaction, impact on the overall financial state of the organization, and business unit budget improvement as examples of good metrics.

What followed was a brief overview of law firm profitability. This partially served to emphasize how most firms cap their own revenue. Maximum revenue is equal to the number of billable hours times hourly rate times number of timekeepers. Maximum profit is then adjusted downward, called the “waterfall of profitability.” Potential profit is limited by factors like utilization rate, realization rate, and the number of hours actually worked. Using short-term metrics in this case is counterproductive, because it incentivizes inefficient work by encouraging lawyers to bill the maximum number of hours to reach maximum utilization. In the long term, this discourages client retention.

Corcoran argued the billable hours economic model for law firms means law firms are highly limited in their ability to increase revenue. Of the major variables that determine maximum revenue, the only one that can feasibly be controlled is the number of attorneys. This limitation causes law firms to prioritize mergers and acquisitions, even though they may be acquiring firms with very different practice areas and organizational cultures.

Generally, businesses prioritize their most successful departments, but by showing examples of several different metrics using the same data, Corcoran demonstrated how choice of metrics has a drastic impact on which department is perceived as the most successful. He displayed graphs that demonstrated how looking only at raw sales numbers paints a very different picture than looking at year over year sales or when expenses are included. Looking at the right metrics can cause shifts in client priority and resource allocation.

Corcoran explained proper metrics should allow staff to see trends across data and create projections for the future. He said margin should be included, but it doesn’t necessarily mean anything without also looking at dollar amounts. He stated strategy should drive choice of metrics, while metrics drive behavior. Corcoran argued compensation can be a key driver, but it does not necessarily provide a good incentive for changing behavior.

According to Corcoran, the most important concern for metrics is data quality. Because metrics should drive behavior, bad data means changes in behavior are not actually addressing areas of concern or areas for improvement. The partitioning of data into silos is a barrier to getting high-quality data centralized, which is a prerequisite for good metrics. Balance scorecards can be incredibly helpful in breaking down data silos.

Beyond choosing the right data, Corcoran claimed organizing metrics for different levels of the organization can be helpful. Organizations should begin with large-scale metrics for the organization as a whole, then narrow down to department-specific metrics, and finally to individual metrics. He argued an effective strategy links these metrics for maximum benefit.

Wrapping up, Corcoran warned while client satisfaction is a very useful metric, it is important to recognize that it will skew toward the negative. He suggested this is because dissatisfied clients are more likely to speak out. The session concluded with a brief brainstorming session on possible useful metrics.

OCLC Update

Jason LeMay
Emory University

The Online Bibliographic Services Special Interest Section (OBS-SIS) *OCLC Update* was held from 7:30-8:30AM on Monday, July 18, 2016. Rob Favini, OCLC Member Relations Liaison, provided WorldCat and WorldShare updates, information about the OCLC Community Center, and information about OCLC and Linked Data.

Upcoming Events with OCLC

OCLC will be offering several events at the upcoming International Federation of Library Associations and Institutions (IFLA) World Library and Information Congress (WLIC) 2016 taking place in Columbus, Ohio. Some of the events include a Cataloging/Metadata Update, sessions about WorldShare Management Services, and an OCLC Research Update session.

OCLC is also continuing to offer additional OCLC Member Forums through 2016. These forums are practitioner-oriented and will be occurring in various cities throughout the United States.

WorldCat Updates

OCLC is celebrating WorldCat's 45th birthday this year! WorldCat currently contains more than 374 million records with more than 2.4 billion holdings. Much of this growth has come from automated loads of new libraries, which has led to a variety of data quality issues. OCLC depends on community members and OCLC staff and automation to improve records. OCLC member libraries improved 1.2 million records in FY15, while OCLC staff and automated processes improved nearly 76 million.

WorldShare Collection Manager

WorldShare Collection Manager (WCM) is an OCLC product that groups WorldCat records into collections and knowledge bases. OCLC collections are continuing to be migrated into WCM, and WCM can be used to automate delivery of updated records, to access and receive knowledge base collections, and to receive cataloging partner collections. Many of these collections are now being referred to by their new name, WorldCat Data Sync Collections, and Batchload Services will be moving over to the service in August/September 2016.

Support options for WCM include a weekly "Office Hours" conference call and WebEx every Tuesday from 12:00-1:30PM (Eastern). Participants can connect any time during the session to ask any questions they have about WCM. Additional Office Hours are available for other products, as well as more specific parts of the WCM structure, such as the Data Sync Collections described above.

WorldShare Record Manager

Record Manager (RM) is being implemented to allow record-at-a-time cataloging from within the WorldShare platform. This product is currently available to WMS users and Connexion browser users who choose to participate as early adopters. RM will replace Connexion completely at some point in the future, however, no end-of-life date has been set for Connexion client at this time. RM is still in active development and will not likely be considered fully ready for quite some time.

OCLC Community Center

In an effort to centralize support options, OCLC has been building Community Centers for various products (called Communities). Community Center allows for communication between members and provides social media-like features, community directories, and documentation for the products. The WorldShare community can also be accessed from the help menu in WorldShare.

OCLC and Linked Data

The remainder of the OCLC Update was used to discuss OCLC's work with Linked Data. OCLC is investigating and using Linked Data (LOD) across the full company. The primary goal is discovery, leveraging the rich WorldCat data and beginning to plan for life after MARC. OCLC is also collaborating on Bibliographic Framework Initiative (BIBFRAME) with the Library of Congress, but this is not the direction OCLC is moving in use of LOD. While BIBFRAME is more structured, OCLC is looking more at Google's unstructured way of using data.

OCLC is using schema.org to model bibliographic data and is collaborating to expand schema.org. At this time, OCLC is focusing on Person and Work entities and has marked-up the entire WorldCat database with Uniform Resource Identifiers (URIs). As of three years ago, OCLC had released 197 million Work IDs and 18 million Person IDs. Bibliographic records are converted to Work entities that are discoverable by Google and other websites, while Person entities can be seen in tools such as VIAF, the Virtual International Authority File.

OCLC Research has been creating new tools in an effort to experiment with LOD from WorldCat. Among these tools are Cookbook Finder, Kindred Works, and Fiction Finder. OCLC LOD news and information can be found in the *OCLC Next* blog and in presentations or publications from OCLC Research.

More detailed information, as well as links, can be found in Rob Favini's presentation slides which were sent out to the TS-SIS and OBS-SIS forums. If you did not receive this and need another copy, just let me know at jason.lemay@emory.edu.

Announcements from OCLC

OCLC Announces Full Unicode Character Support in WorldCat Coming

OCLC sent out an announcement to the OCLC-CAT list on June 6, 2016, to detail plans for full Unicode character and script support in OCLC WorldCat. By the end of 2016, WorldCat users will be able to upload, catalog, and search WorldCat using full Unicode.

Users that export records in MARC-8 encoding (the default) will see non-MARC-8 script characters represented in Numeric Character Reference (NCR) format. Users that receive records in UTF-8 will receive records with full Unicode characters.

If users are relying on current processes to block characters unsupported in their current system, they will need to update workflows that may be impacted by this change.

OCLC Announces WorldShare Collection Manager Enhancements

OCLC sent out an announcement to the OCLC-CAT list on July 21, 2016, to detail planned enhancements to WorldShare Collection Manager (WCM). Most of the enhancements announced target the WorldCat Cataloging Partner collections, including the options to limit output by encoding levels and cataloging source.

All WCM users will also see benefits from enhancements to "My Files" that provide options to hide files already downloaded and options to sort files by filename or date.

All of these enhancements were generated by member enhancement requests submitted via the Community Center. The Community Center may be accessed at http://www.oclc.org/community/home.en.html.

OCLC Linked Data Survey Report

An OCLC Research survey published on *D-Lib Magazine* suggests that Linked Data is being used to enhance local records and provide local users with a richer search experience. OCLC analyzed 112 Linked Data projects for this survey.

The report can be found at http://www.dlib.org/dlib/july16/smith-yoshimura/07smith-yoshimura.html.

OCLC-MARC Bibliographic and Holdings Format Update 2016

OCLC installed the OCLC-MARC Bibliographic and Holdings Format Update 2016 in August 2016. This update includes new codes for 007 fields, various new subfields in Bibliographic and Authority records, and conversion of MARC field 305 to 300.

Detailed information may be found in OCLC Technical Bulletin 266 at https://www.oclc.org/support/services/worldcat/documentation/tb/266.en.html.

MARC21 Updates Nos. 21 and 22 are included in this update, and more details from the MARC21 site may be found at http://www.loc.gov/marc/marc21_update21_online.html and http://www.loc.gov/marc/marc21_update22_online.html.

Further announcements will be sent out by OCLC through various discussion lists and the Connexion logon greetings.

OCLC Announced Connexion Client Version 2.63 for Unicode Support

OCLC has announced the release of Connexion client version 2.63, to replace Connexion versions 2.50 and 2.51. This version is part of an expansion of WorldCat support for the full Unicode characters and scripts. By the end of 2016, WorldCat will support all Unicode scripts and will allow cataloging and searching across full Unicode.

Beginning in early January 2017, users of Connexion 2.50 and 2.51 will receive upgrade warnings when starting Connexion. Upgrading to version 2.63 will be required by February 28, 2017.

The upgrade can be downloaded from http://psw.oclc.org/.

Upgrade instructions can be found at http://www.oclc.org/content/dam/support/connexion/documentation/client/gettingstarted/gettingstarted/gettingstarted.pdf#page=31.

Report of the American Association of Law Libraries (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 Annual Meeting 2016, Orlando, Florida

Robert Bratton
George Washington University Law Library
AALL Liaison to CC:DA

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

I. Law cataloging and general cataloging issues before CC:DA

1. I submitted AALL's one change proposal (http://alcts.ala.org/ccdablog/wp-content/uploads/2016/06/AALL-2016-2.pdf) regarding adding instructions for creating Authorized Access Points (AAPs) for single laws governing multiple jurisdictions. After some discussion and questions, CC:DA voted unanimously to approve our proposal. ALA's representative to the *Resource Description and Access* (*RDA*) Steering Committee (RSC) will reformulate the proposal, and then it will go to other cataloging communities and the RSC itself for comments.
2. Regarding our previous change proposal for adding an instruction for AAPs for the names of international courts, although it is not official yet, the current consensus is to add (1) a sentence about international courts in the *RDA* instruction for names of courts (11.2.2.21) pointing to the instructions for names of corporate bodies (11.2.2.4) and (2) an example of an international court to the instruction for international bodies (11.2.2.5.3). We should have the final decision sometime in July. While they may not accept our proposal exactly as worded, they are going to add language and an example pertaining to international court AAPs, and that was the whole point.

   The international courts proposal and a few others were put through as an experiment informally called "fast track plus." Ironically, that has delayed the decision on the proposal for a longer period of time than it normally would have taken. If this experiment succeeds, the change will go into the August *RDA* Toolkit release.
3. There was a change proposal to allow for greater flexibility in creating variant access points (http://alcts.ala.org/ccdablog/wp-content/uploads/2016/06/RSCrep-kpg-2016-1-rev.pdf). The proposal also seeks to make the language and substance of all the instructions pertaining to variant access points more in synch with each other. CC:DA voted unanimously to approve the proposal. I questioned the examples in the proposal at *RDA* 9.19.2.1 because I thought they were a bad idea. The response I got was that such variants might be needed to link AAPs from different controlled vocabularies together. However, we may need a Library of Congress Program for Cooperative Cataloging (LC-PCC) Policy Statement to clarify we should not make such variant access points within a single controlled vocabulary, like the Name Authority Cooperative Program (NACO) Authority File.
4. A Task Group submitted a discussion paper (http://alcts.ala.org/ccdablog/wp-content/uploads/2016/06/TF-Accomp-Mat-2.pdf) pertaining to the ongoing debate on how *RDA* should handle "accompanying material." One of the sticking points is whether or not there should be a "single path" or if there needs to be a distinction between supplementary things that are on the same carrier as the primary resource (e.g., bonus content on a DVD) and things that are on a different carrier than the primary resource (e.g., a DVD supplement published with a book).
5. During the past six months, ALA submitted fast track proposals to:
   - Clarify that, for early printed resources, we may treat distribution and manufacture statements relating to booksellers and printers as publication statements;
   - Revise 2.3.5.3 to better address multiple parallel other title information statements;
   - Add eight new terms and revise one existing term in *RDA* Appendix I for roles associated with music/audiovisual resources; and
   - Update the *RDA*/MARC mapping in the "Tools tab" to link MARC Authorities field 377 to *RDA* 6.11 (Language of Expression) and vice versa.

II. Review of the Functional Requirements for Bibliographic Records-Library Reference Model (FRBR-LRM)

The International Federation of Library Associations and Institutions (IFLA) published the FRBR-LRM (http://www.ifla.org/node/10280?og=54) in February 2016, and it was open for comments through May 1, 2016. The FRBR-LRM is an attempt to consolidate the three separately developed conceptual models—FRBR, Functional Requirements for Authority Data (FRAD), and Functional Requirements for Subject Authority Data (FRSAD)—into a single, consistent model.ALA's comments (http://alcts.ala.org/ccdablog/?p=2751) prepared by a CC:DA Task Force were rather critical of the proposed model. Gordon Dunsire spoke at the CC:DA meeting about the internationalization of *RDA* and application profiles (http://alcts.ala.org/ccdablog/wp-content/uploads/2016/06/RDAInterAP.pdf). During the question-and-answer portion, he said the FRBR Review Group has set aside a full day at their upcoming meeting (at the IFLA World Library and Information Congress on August 13-19, 2016, in Columbus, Ohio) to discuss all of the feedback they have received on FRBR-LRM. He said he assumed they would modify the model based on feedback and ultimately adopt it. A blog post containing links to different community responses is available at https://frbropencomments.wordpress.com/community-response/.

III. Governance Structure of *RDA*

The five-year transition period changing the governance structure of *RDA* is underway. As reported last time, representation on the RSC will be based on UN regions rather than by library organizations. The impact for U.S. catalogers is, instead of an ALA representative serving on the RSC, there will be one person representing North America on the RSC. Currently, North America is defined as Canada and the United States (and if they ever adopt *RDA*, then Bermuda, Greenland, and Saint Pierre and Miquelon). Kathy Glennan (the current ALA representative to the RSC) reported that little has been done to set up how this will work for the U.S. and Canada, so for now and the near future, it is the status quo. The Europeans have done some work on establishing how they will have a single representative.

IV. Library of Congress report

Dave Reser gave the Library of Congress report. President Obama's nomination of Dr. Carla D. Hayden to be the next Librarian of Congress was approved by the Senate Committee on Rules and Administration on Thursday, June 9, 2016. The nomination now goes to the full Senate for consideration. Timing of consideration by the Senate is unknown, but Dr. Hayden is expected to be confirmed. If confirmed, Dr. Hayden will be the first woman and first African-American to be Librarian of Congress. [*Editor's Note: Dr. Hayden was sworn in as the Librarian of Congress on September 14, 2016.*]

Gabe Horchler, Head of the Law Section, retired on February 20, 2016, after 45 years at LC. Interviews for his successor were underway as of June 10, 2016.

The Acquisitions and Bibliographic Access Directorate has permission to fill approximately 30 vacancies from open postings (not limited to internal applicants) in 2015-2016. Most of the open positions are for professional librarians and may carry specific language requirements.

V. Bibliographic Framework Initiative (BIBFRAME) Pilot Phase 1 at LC

Phase 1 of the BIBFRAME pilot testing at LC took place between October 1, 2015 and March 31, 2016. Participants in the first pilot were approximately 40 catalogers and technicians who catalog materials in all languages, scripts, and formats. They cataloged the materials they regularly received. During this process, LC revised the BIBFRAME vocabulary, Editor, and Profile Editor. The original vocabulary is now referred to as BIBFRAME 1.0. The vocabulary that will be used in the second phase of the pilot testing is BIBFRAME 2.0. The second phase will begin no sooner than October 2016. A full report of the Pilot Phase 1 is available at https://www.loc.gov/bibframe/docs/pdf/bibframe-pilot-phase1-analysis.pdf.

VI. PCC report

Lori Robare gave the report from the Program for Cooperative Cataloging (http://alcts.ala.org/ccdablog/wp-content/uploads/2016/06/PCC-2016-06.pdf). There is a lot of work currently underway and the report is worth reading (it's only three pages). A few highlights include:

- The Series Policy Task Group has almost finished its review of series-related LC-PCC Policy Statements and portions of the *Descriptive Cataloging Manual* (*DCM*) section Z1 (*DCM* Z1). The group has submitted a small number of revisions that will appear in the August 2016 release of the *RDA* Toolkit: series introduction; *DCM* Z1 380, 381, and 5XX fields; and LC-PCC Policy Statements 6.3.1.3 and 6.12.1.3.
- A major revision of the May 2014 preliminary edition of the entire *RDA* series training manual is nearly complete. Several revised sessions are already posted on the Catalogers Learning Workshop website, and the remaining sessions should be completed soon.

- The Standing Committee on Training has completed guidelines for the use of MARC authority fields 672 (Title related to the entity) and 673 (Title not related to the entity), which are expected to be incorporated into the *DCM* Z1 manual in the August 2016 release of Cataloger's Desktop.
- A group was charged with identifying revisions needed to NACO Funnel webpages and documentation. A review of the Monographic Bibliographic Record Cooperative Program (BIBCO), the Cooperative Online Serials Program (CONSER), and the Subject Authority Cooperative Program (SACO) Funnel documentation may follow.

VII. CC:DA Meeting Agenda

Many of the proposals, papers, reports, and discussions can be accessed from CC:DA's posted meeting agenda at http://alcts.ala.org/ccdablog/?p=2797.

Report of the American Association of Law Libraries (AALL) Representative to the MARC Advisory Committee (MAC) 2016 American Library Association (ALA) Annual Meeting Report Orlando, Florida

Jean M. Pajerek
Cornell Law Library
AALL Liaison to MAC

The MARC Advisory Committee (MAC) convened two meetings at the American Library Association (ALA) 2016 Annual Meeting in Orlando. The Committee took action on 14 discussion papers and 11 proposals during the meetings. Members voted on several of the discussion papers as proposals (after discussion) and approved them. Due to the extraordinary number of discussion papers and proposals considered at these meetings, this report will focus on proposals that MAC approved, which will therefore become part of MARC 21. Most of the discussion papers that MAC did not vote on as proposals (the majority of which will be re-submitted as proposals) and proposals with no applicability to the law library community are not covered in this report. The complete texts of all proposals and discussion papers considered by MAC at the 2016 ALA Annual Meeting are available at https://www.loc.gov/marc/mac/an2016_age.html.

Of interest beyond the proposals and discussion papers is the news that the Library of Congress (LC) is developing a MARC Steering Committee Fast-Track subgroup. This group will be tasked with adding some of the widely used, or "free-floating," subfields to fields where they are needed and revising or re-writing cumbersome field and subfield definitions. The group will also address inconsistencies within and throughout the MARC format documentation.

The work of this group will primarily take place between conference meetings. All revisions and additions to the MARC 21 formats made by this MARC Fast-Track group will be announced and posted to the MARC mailing list. (Thanks to Everett Allgood, MAC Secretary, for this information.)

Proposal No. 2016-03
Clarify the Definition of Subfield $k and Expand the Scope of Field 046 in the MARC 21 Bibliographic Format
http://www.loc.gov/marc/mac/2016/2016-03.html
Source: Online Audiovisual Catalogers (OLAC)

The use of subfield $k (Beginning or single date created) in field 046 (Special Coded Dates) of the Bibliographic Format is inconsistent because the standard states that "[d]ates contained in subfield $k may not be coded elsewhere in the formats." The ambiguity of the meaning of the word "may" in this sentence and whether it is actually intended to be proscriptive (in the sense of "must" not be coded elsewhere) has led catalogers to avoid its use. In order to facilitate the use of 046 $k to consistently record the original date of a moving image work, the Online Audiovisual Catalogers (OLAC) propose the removal of the restriction/ambiguity in the definition of subfield $k. MAC approved this proposal with minor revisions. As an aside, it was agreed that use of the abbreviation "B.C." in reference to dates is outmoded. LC will revise the MARC documentation to replace B.C. with "B.C.E." (Before the Common Era).

Proposal No. 2016-05
Defining New X47 Fields for Named Events in the MARC 21 Authority and Bibliographic Formats
http://www.loc.gov/marc/mac/2016/2016-05.html
Source: OCLC

Proposal No. 2016-05 proposes the creation of a new series of X47 fields to accommodate the need for clear definitions and predictable coding to differentiate between named events that cannot be regarded as responsible agents (e.g., "Eruption of

Vesuvius," "Hurricane Katrina") versus meetings and conferences. Currently, both kinds of named events are designated as 611 fields in Faceted Application of Subject Terminology (FAST) headings. The Committee approved the proposal.

Proposal No. 2016-06
Defining Field 347 (Digital File Characteristics) in the MARC 21 Holdings Format
http://www.loc.gov/marc/mac/2016/2016-06.html
Source: Cooperative Online Serials Program (CONSER), Program for Cooperative Cataloging (PCC)

Provider-neutral guidelines for creating bibliographic descriptions of online resources avoid including details that vary by provider, including digital file characteristics. This paper proposes defining field 347 (Digital File Characteristics) in the MARC 21 holdings format where catalogers could use it to encode digital file characteristics specific to a particular version of an electronic resource. MAC approved the proposal unanimously.

Proposal No. 2016-09
Recording Distributor Number for Music and Moving Image Materials in the MARC 21 Bibliographic Format
http://www.loc.gov/marc/mac/2016/2016-09.html
Source: Music Library Association

This paper recommends changes to field 028 in the Bibliographic Format to allow for the recording of distributor numbers in this field, as well as publisher numbers, as is the current practice. It also recommends revising the existing definition of field 037 to clearly indicate that catalogers should not use field 037 to record music and audiovisual publisher and distributor numbers. The Committee approved the proposal unanimously.

Proposal No. 2016-10
Punctuation in the MARC 21 Authority Format
http://www.loc.gov/marc/mac/2016/2016-10.html
Source: German National Library

Because of differing practices between the German authority file and the LC Name Authority File concerning the use of punctuation in authority records, the German National Library proposes that MARC Authority Leader position 18 (currently undefined) be defined as "Punctuation Policy." The recommended code values would indicate whether the record includes or omits punctuation. The Committee recommended adding a clarification to indicate the punctuation referred to in the proposal is terminal punctuation, not punctuation within a field or subfield. The Committee approved the proposal unanimously.

Proposal No. 2016-11
Designating Matching Information in the MARC 21 Bibliographic and Authority Formats
http://www.loc.gov/marc/mac/2016/2016-11.html
Source: German National Library

This proposal recommends the definition of a new MARC field 885 ("Matching Information") to document the existence of a match between records that exist in an authority file and incoming records being added to the file. When a possible match is identified, the new field ("Matching Information") would be added to the incoming record to facilitate resolution of potentially duplicate records. When considered as a discussion paper at the 2016 ALA Midwinter Meeting, the definition of the field applied only to the Authority Format, but the Committee recommended expanding the scope to include the Bibliographic Format as well; this change is reflected in the proposal. MAC members discussed the proposal heavily and suggested a number of tweaks. MAC approved the proposal by a narrow margin.

Proposal No. 2016-12
Designation of a Definition in the MARC 21 Authority format
http://www.loc.gov/marc/mac/2016/2016-12.html
Source: German National Library

This proposal recommends defining a MARC field, possibly 677, in the Authority Format to accommodate the encoding of definitions that are intended for display to the end user. When this recommendation was initially considered as a discussion paper at the 2016 ALA Midwinter Meeting, there were some Committee members who felt we could accommodate definitions in the 680 field (Public General Note), possibly with some tweaking to the subfields. In this proposal, the German National Library addresses this observation by citing International Standardization Organization (ISO) 25964 ("Thesauri and interoperability with other vocabularies"), which states "a separate note field should be established for … definitions so that they do not become confused with any scope notes." MAC approved the proposal with a few amendments, including the addition of subfield $u to the new field.

Proposal No. 2016-13
Designation of the Type of Entity in the MARC 21 Authority Format
http://www.loc.gov/marc/mac/2016/2016-13.html
Source: German National Library

This proposal considers the definition of a new variable field (075) in the Authority Format to accommodate coding to indicate the type of entity described in the authority record. Person, work, corporate body, and topical term are examples of the kinds of entity terms we could encode in the proposed field. The Committee approved the proposal with minor edits.

Discussion Paper No. 2016-DP17
Redefining Subfield $4 to Encompass URIs for Relationships in the MARC 21 Authority and Bibliographic Formats
http://www.loc.gov/marc/mac/2016/2016-dp17.html
Source: British Library in consultation with the PCC Task Group on Uniform Resource Identifiers (URIs) in MARC

This paper recommends redefining the scope of subfield $4 (currently labeled as "Relator code" or "Relationship code"), which is defined in a broad range of fields in both the Authority Format and the Bibliographic Format, to allow the recording of Uniform Resource Identifiers (URIs) for relationships. Currently, we can only use subfield $0 to record URIs for relationships, which creates ambiguity in cases where it is possible to record URIs for both relationships and the entities associated with those relationships in the same subfield string. The proposed redefinition of subfield $4 would provide for the recording of relationship URIs in a separate subfield that distinguishes them from URIs for entities. This discussion paper will return as a proposal.

Discussion Paper No. 2016-DP18
Redefining Subfield $0 to Remove the Use of Parenthetical Prefix "(uri)" in the MARC 21 Authority, Bibliographic, and Holdings Formats
http://www.loc.gov/marc/mac/2016/2016-dp18.html
Source: PCC Task Group on URIs in MARC in consultation with the British Library

Identifiers for entities may be recorded in subfield $0 (Authority record control number or standard number) in the MARC 21 Authority and Bibliographic Formats. As currently implemented, the identifier must be preceded by the standard identifier source code or MARC organization code in parentheses directly following the $0. This paper contends that, when subfield $0 contains a URI, the parenthetical code (uri) is redundant and unnecessary because the content of the subfield is unambiguously a dereferenceable URI (i.e., http clients can look up the URI using the http protocol and retrieve the resource that is identified by the URI). According to the paper, "[p]arsing MARC data for URIs is significantly easier when a subfield $0 contains a URI, and nothing else." After strengthening some of the language to make it less ambiguous, the Committee voted on the paper as a proposal. MAC approved the proposal with one abstention.

Discussion Paper No. 2016-DP19
Adding Subfield $0 to Fields 257 and 377 in the MARC 21 Bibliographic Format and Field 377 in the MARC 21 Authority Format
http://www.loc.gov/marc/mac/2016/2016-dp19.html
Source: PCC Task Group on URIs in MARC

This paper proposes defining subfield $0 (Authority record control number or standard number) for field 257 (Country of Producing Entity) in the Bibliographic Format and field 377 (Associated Language) in both the Bibliographic Format and the Authority Format. The addition of subfield $0 (containing an actionable URI) in these fields will facilitate the transformation of MARC data into Linked Data. The Committee voted to convert this discussion paper into a proposal on the spot and then unanimously approved it.

Discussion Paper No. 2016-DP21
Defining Subfields $e and $4 in Field 752 of the MARC 21 Bibliographic Format
http://www.loc.gov/marc/mac/2016/2016-dp21.html
Source: Association of College & Research Libraries (ACRL) Rare Books and Manuscripts Section (RBMS)

ACRL's Rare Books and Manuscripts Section recommends defining subfields $e (Relator term) and $4 (Relator code) in Field 752 (Added Entry-Hierarchical Place Name) of the MARC 21 Bibliographic Format. Field 752 is used by the rare materials cataloging community to record a normalized place of publication, distribution, manufacture, or production. The proposed subfields would allow catalogers to specify the relationship between a geographic name and the material being described. The Committee moved to vote on this paper as a proposal, with some minor edits. The Committee unanimously approved the proposal.

Discussion Paper No. 2016-DP24
Define a Code to Indicate the Omission of Non-ISBD Punctuation in the MARC 21 Bibliographic Format
http://www.loc.gov/marc/mac/2016/2016-dp24.html
Source: OCLC and PCC International Standard Bibliographic Description (ISBD) and MARC Task Group

This paper discusses the need for an additional code in Leader/18 (Descriptive cataloging form) of the MARC 21 Bibliographic Format to indicate the omission of non-ISBD punctuation. According to the paper, "[the] implementation of such coding would allow for easy identification of pre-ISBD and non-ISBD records where punctuation has been omitted or removed." It proposes redefining Leader/18 value blank as "Non-ISBD punctuation included" and defining a new value "n" to mean "Non-ISBD punctuation omitted." The Committee moved to vote on this paper as a proposal, with minor revisions. MAC approved the proposal, but the definition of Leader/18 value blank will remain as "Non-ISBD."

Discussion Paper No. 2016-DP25
Extending the Encoding Level in the MARC 21 Authority Format
http://www.loc.gov/marc/mac/2016/2016-dp25.html
Source: German National Library

This paper is a reworked version of Discussion Paper No. 2016-DP16 (http://www.loc.gov/marc/mac/2016/2016-dp16.html), which was considered at the 2016 ALA Midwinter Meeting. In the original paper, the German National Library was seeking the extension of Leader position 17 (Encoding Level) in the MARC Authority Format to accommodate the encoding of seven levels of completeness and the editorial level of the staff that created or modified the record. As currently defined, Leader 17 has only two valid values: "n" for Complete authority record and "o" for Incomplete authority record. After discussing the revised version of the paper, the Committee concluded that they could accommodate the needs of the German National Library by adding codes to the MARC Authentication Action Code List, which the library can then use in the 042 field (Authentication Code) of the Authority Format. The paper was withdrawn, since no further action was required by the MARC Advisory Committee.

Discussion Paper No. 2016-DP27
General Field Linking with Subfield $8 in the Five MARC 21 Formats
http://www.loc.gov/marc/mac/2016/2016-dp27.html
Source: German National Library

Catalogers use subfield $8 (Field link and sequence number) to link related fields within a single MARC record. The structure and syntax for the field link and sequence number subfield is:

> $8 [linking number].[sequence number]\[field link type]

The discussion paper concerns itself with the final element of subfield $8, the field link type, which currently has five defined values. The outcome of the Committee›s discussion is a proposal to define a new value "u" for field link type (General linking, type unspecified) for subfield $8 in all MARC 21 formats. After making and approving a motion to consider this discussion paper as a proposal, the Committee approved the proposal with two opposing votes and four abstentions.

Report of the American Association of Law Libraries (AALL) Representative to the American Library Association (ALA) Subject Analysis Committee (SAC) Annual Meeting, Orlando, Florida June 26-27, 2016

Lia Contursi
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Highlights from:

- Policy and Standards Division (PSD) of the Library of Congress (LC) (Janis Young)
- Music Library Association (MLA) (Casey Mullin)
- Art Libraries, Society of North America (ARLIS/NA) (Sherman Clarke)
- Faceted Application of Subject Terminology (FAST) Report (Diane Vizine-Goetz)
- Subject Analysis Committee (SAC) Subcommittee on Genre/Form (Adam Schiff)
- SAC Working Group on the Library of Congress Subject Headings (LSCH) heading "Illegal aliens" (Tina Gross)

The special program presentation was "Pre-Coordinate vs. Post-Coordinate Subject Access: The Pros and Cons and a Real-Life Experience," by Peter Fletcher, Team Leader International and Knowledge Management Teams, Cyrillic Catalog

Librarian & Metadata Specialist, UCLA Cataloging & Metadata Center, and Diane Boehr, Head, Cataloging & Metadata Management Section, National Library of Medicine.

1. Policy and Standards Division (PSD)

In January 2016, the Library of Congress (LC) made available the manuals of the Library of Congress Genre/Form Terms (LCGFT) and the Library of Congress Demographic Group Terms (LCDGT). They are both in draft form. The comment period ended on May 31, 2016. AALL proposed to change part of the instruction sheet J230 (Legislation and Legislative Literature) that relates to the use of the term "Law commentaries." The Technical Services Special Interest Section (TS-SIS) Classification and Subject Cataloging Advisory Working Group (CSCAG) proposed that in special cases where a law commentary contains the text of a law in its entirety and separate from the commentary, catalogers could use the terms "Law commentaries" and "Statutes and codes" paired together in bibliographic records. PSD has not yet made any decision on this.

After the 2016 ALA Midwinter Meeting, PSD received many comments on the use of local demonyms and suggestions on how to best disambiguate them. PSD is reviewing all the responses and may make a final decision before the end of the year. The vocabulary of Demographic Group Terms is available online in PDF format for free download. However, it is also available in ClassWeb. Catalogers may assign the terms in bibliographic as well as in authority records to indicate the contributors and the intended audience to a resource.

The subclass for the Law of Indigenous Peoples in North America continues to expand, and it is now fully functional for the range from KIA to KIK. LC has also authorized the related KF range from KF8200 to KF8578.

2. MLA

Since the 2016 ALA Midwinter Meeting, 24 more music LCGFT have been approved and four more are in the Tentative List 1606. In addition, 16 terms have been added to the Medium of Performance Thesaurus (LCMPT).

On June 3, the British Library announced they are discontinuing the use of LCSH to express genre/form or medium of performance, for which they will replace the appropriate music LCGFT and LCMPT terms. This is a policy that the music librarians at the MLA would like to adopt eventually.

A project on retrospective application of music LCGFT and LCMPT is underway. Most bibliographic records are identified through some specific LCSH subdivisions and fixed fields codes. Concurrently, a SAC subgroup is working on mapping records where literature, law, and general LCGFT would also be appropriate. The plan is to extract OCLC identification numbers from the list of identified records and eventually to prepare a crosswalk for OCLC for retrospective application.

3. ARLIS/NA

ARLIS was invited to participate in the ARTFRAME project, which is an effort coordinated by Melanie Wacker at Columbia University to investigate how the Bibliographic Framework Initiative (BIBFRAME) works for cultural objects.

The work on art genre forms continues. The working group struggled to determine the level of granularity for the thesaurus. The specific disciplines and whether or not the specificity is expressed in the *Art and Architecture Thesaurus* or the *Thesaurus for Graphic Materials* will also determine the level of granularity. Overall, though, there is not a deep level of specificity in the current list, which contains about 120 terms so far. The working group hopes to finish a draft by the end of the summer.

4. FAST/OCLC

Currently, catalogers have enhanced about 90 million records with FAST headings in WorldCat. There are two new tools in the experimental phase, but they are fully functional and available:

- **AssignFAST** is a new feature to facilitate the application of FAST headings and based on the so-called "autosuggest technology." When catalogers type a word in the search box, a number of suggested headings appear in a scrolling list, together with some "see also" terms. Selecting one from the list prompts the automatic highlighting of the heading for easy copy and paste.
- **SearchFAST** is a new interface operating under the same principles. It is based on a concept of seemingly intelligent semantic technology. When users type a word in the search box, the system brings up a number of possible headings, or indicates "see also" references, thus simplifying the retrieval of FAST headings. The interface shows the search box, the list of results, and some selected bibliographic records in WorldCat all together on the same screen.

5. SAC Subcommittee Genre/Form

The Subcommittee drafted two MARC Discussion Papers:

370 field - Associated place in bibliographic and authority records (defining three new subfields)
$i (relationship information)
$3 (materials specified)
$4 (relationship code)

386 field - Creator/Contributor characteristics in bibliographic and authority records (defining two new subfields)
$i (relationship information)
$4 (relationship code)

The MARC Advisory Committee (MAC) did not formally approve these papers, even though there seemed to be a general consensus. In Orlando, MAC asked the SAC Subcommittee on Genre Terms to produce a white paper by the next ALA Midwinter Meeting.

After the revised definition of Genre/Form terms approved by LC in December 2015, 13 more literature LCGFT have been proposed, but LC has not made any decisions yet on these.

A subgroup of four people (including our own law cataloging colleague, Yael Mandelstam) have worked on strategies and techniques for retrospective assignment of literature, music, and general LCGFT to bibliographic records. The group looked into form subdivisions and fixed fields and provided mapping for codes to LCGFT. A master spreadsheet is publicly available in ALA Connect.

We discussed the future of the SAC Subcommittee on Genre Terms. The Subcommittee's completed its work on the compilation of Literature terms and General terms, but the working group would like to continue to work on related projects, such as a retrospective application of LCGFT and a compilation of a new LCGFT for videogames.

It was also noted that with all the new controlled vocabularies, such as the Demographic Group Terms, and the potential to establish a thesaurus of terms for the relationship information to use in $i for 370 and 386 fields, the work of a subgroup could continue, possibly with new members specialized in more disciplines. As we are moving into a world of Linked Data, even the definition of Subject Heading seems restrictive. There are areas such as the LCDGT and its Demonyms where the lines between subject analysis and description of relationships overlap or become more indistinct. This conversation will be revisited at the next ALA Midwinter Meeting.

6. SAC Working Group on the LCSH "Illegal aliens"

On March 22, 2016, LC announced that two new subject headings—"Unauthorized immigration" + "Noncitizens"—would replace the deprecated "Illegal aliens." However, the SAC Working Group on the LCSH "Illegal aliens" that was formed at the 2016 ALA Midwinter Meeting decided to continue the study on the feasibility of the subject heading initially proposed, "Undocumented immigrants." Analysis on sample records in a small "study" pointed to the fact that "Illegal aliens" is a much broader term than "Undocumented immigrants," because "Illegal aliens" comprises also the noncitizens who are not immigrants. Similar to the term "Undocumented immigrants," also "Unauthorized immigration" + "Noncitizens" cannot automatically substitute for "Illegal aliens" because not all illegal aliens are immigrants. Instead, we could describe some more appropriately with narrower LCSHs, such as "Foreign workers"; "Refugees"; "Visitors, Foreign"; "Admission of non-immigrants"; etc.

The current and common use of the phrase "undocumented immigrants" seems to refer exclusively to foreign-born people who reside in a country without authorization, thus justifying the term as a viable option as a subject heading, corroborated by literary warrant. The proposal of the working group is to replace "Illegal aliens" with "Undocumented immigrants" and indicate in the scope note that the heading refers to foreign-born persons residing in a country without documentation of required authorization. However, complicating the discussion is the current controversy between Congress and LC that started last April with the introduction of a bill to retain the LCSH "Illegal aliens," which the House Appropriations Committee voted favorably on.

SAC discussed the feasibility of the proposed heading "Undocumented immigrants." Some of the voting members were in favor, while others had some objections. The Committee decided the proposal was right in principle, but asked the working group on "Illegal aliens" to make some changes to the language of the report and send the corrected proposal to SAC by mid-July. Then SAC will give final approval and will send recommendations to ALA. ALA intends to write an official statement on the matter of the replacement of the LCSH "Illegal aliens."

Other News

The Cataloging in Publication (CIP) and Dewey sections of the Library of Congress merged their operations effective February 7, 2016. This merger promotes greater collaboration between the CIP and Dewey Program. Caroline Saccucci became the CIP and Dewey Program Manager and Section Head.

In January, the CIP Program discontinued the requirement for libraries to join the Monographic Bibliographic Record Cooperative Program (BIBCO) in order to be eligible for the Electronic CIP (ECIP) Cataloging Partnership Program. Libraries now need only to be Name Authority Cooperative Program (NACO) members to join the program.

Before the official opening of the 2016 International Federation of Library Associations and Institutions (IFLA) Conference, which will be held in Columbus, Ohio, August 13-19, 2016, the IFLA Section of Classification and Indexing will offer a free satellite conference hosted at the State Library of Ohio in Columbus, Ohio, on August 11-12, 2016. The title of this special conference is "Subject Access: Unlimited Opportunities." The conference will stimulate a discussion on best practices and issues related to classification and indexing. The program chair is Sandy Roe, current member of the Standing Committee of the Classification and Indexing Section of IFLA. Among the many presenters there will be Janis Young and Diane Vizine-Goetz.

Finally, a note on the presentation "Pre-Coordinate vs. Post-Coordinate Subject Access: The Pros and Cons and a Real-Life Experience."

Peter Fletcher discussed all the pros and cons of using pre-coordinated strings versus post-coordinated headings:

Pre-coordinate
positives: legacy, headings provide context
negatives: inconsistent structure, less machine-actionable, not optimal for Linked Data

Post-coordinate
positives: consistent structure, context provided by operators/syntax, more machine-actionable, better for Linked Data
negatives: not a broadly established system

In 2005, the National Library of Medicine (NLM) decided to "unstring" the Medical Subject Headings (MeSH). This practice allows the harmonization with the searching techniques that users of medical literature are more acquainted with, considering that post-coordinate subjects are normally applied to journal databases such as MEDLINE and PubMed. The faceted headings allow other libraries to easily download records from NLM without spending time in "unstringing." In addition, post-coordinate facets allow easier authority control. However, some of the shortcomings are loss of effectiveness in Boolean searches, loss of context among the parts of the headings, and lack of precision in retrieval of keyword searches.

Useful Links

- Library of Congress Genre/Form Terms manual (draft version): http://www.loc.gov/aba/publications/FreeLCGFT/freelcgft.html
- Demographic Group Terms web page with PDF of the entire LCDGT vocabulary and the draft version of LCDGT Manual: http://www.loc.gov/aba/publications/FreeLCDGT/freelcdgt.html
- AssignFAST: http://fast.oclc.org/fast/assignfast/
- SearchFAST: http://fast.oclc.org/searchfast/
- IFLA Satellite Conference: https://sites.google.com/a/kent.edu/ifla2016-classification-indexing/

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Panelist Melissa Beck began by issuing a gentle and humorous reminder for catalogers: relax. Change is imminent (e.g., Linked Data), and many in technical services are apprehensive about the skills and knowledge required to adapt. To embrace mindful metadata mastery, the panelist looked to principles of mindfulness first: one must focus on the present. What are the skills you need to know, right now? She recommended listing five desired skills and choosing to focus on only one or two; let the rest go. More practically, Beck recommended several competencies beyond basic cataloging, including batch processing of records, familiarity with programs like MarcEdit, e-resource management and linking, discovery services setup and administration, and a basic understanding of Linked Data and the Bibliographic Framework Initiative (BIBFRAME) model. In looking toward the future, information professionals should try to replace apprehension with curiosity and learning.

Building on the theme of developing a skillset for the future, panelist Sara Campbell demonstrated how librarians can take initiative when networking by creating and sharing with colleagues a “cookie recipe,” or a mental list of one’s most indispensable and high-use resources. Similar to an elevator pitch but customized to specific tools, a cookie recipe should be current, accurate, and brief enough for listeners to retain the information shared. Campbell cautions against overstating one’s knowledge and ignoring the target audience, as the recipe can become a reflection of one’s reputation. She shared examples of sources to look to for populating one’s “recipe,” as well as helpful advice on customizing it to fit individual needs.

Next, panelist Mark Giangrande used a recent cross-department project at his own library at DePaul University College of Law to illustrate the value of collaboration skills in navigating current changes within our field. The project, a joint venture by public and technical services to review the library’s print resources for potential elimination in favor of electronic access, combined both qualitative and quantitative data to inform the decision maker’s understanding of the resources. Notably, the panelist distinguished cooperation and collaboration, pointing out that collaboration represents participants having a stake in the outcome and working together toward a common goal. Ultimately, legal information professionals should be prepared to think beyond cooperation and ask what more could be accomplished through collaboration.

Last but not least, panelist Wendy Moore encouraged the audience to reflect on whether they are truly leveraging the question, “How are things in the library?” In this new age where nothing can be taken for granted, librarians must be poised to promote their work, accomplishments, and ideas at every opportunity. Pitching one’s skills or projects is an important communication tool that helps educate and engage stakeholders and others who support goals. Building pitches is a skill, and investing thought into effectively “mapping” out pitches by project, context, or audience will better enable you to answer that question in a way that benefits both you and the inquirer. Observing the three “C’s” of pitching (concise, customized, and conversational) will ensure your pitch is working for you and not against you.

In true crowdsourcing fashion, the program concluded with an opportunity for the attendees to collaborate with their fellow tablemates in brainstorming other possible skills for legal information professionals of the future, which were then shared with the entire group. Overall, the program was insightful, encouraging, and applicable for information professionals of all types. Attendees received a wealth of information in the form of book, website, and article suggestions for further reading, in addition to handouts detailing topics covered and resources mentioned. This program certainly lived up to its “Must Have Program” status and provided the audience with a lot to both reflect on and act on in preparation of the future information landscape.

TSLL EDITORIAL POLICY

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