



TECHNICAL SERVICES LAW LIBRARIAN

Volume 43 No. 4
June 2018

<https://www.aallnet.org/tssis/resources-publications/technical-services-law-librarian/>

ISSN: 0195-4857

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Renee D. Chapman Memorial Award Announcement

The Technical Services Special Interest Section Awards Committee is pleased to announce that the recipient of the 2018 Renee D. Chapman Memorial Award for Outstanding Contributions in Technical Services Law Librarianship is Richard M. Jost.



Richard is Director of the Law Librarianship Program at the University of Washington School of Law, where he also had previous roles as the Information Systems Coordinator and Assistant Librarian for Technical Services. He is strongly committed to professional service and has consistently contributed to the advancement of our profession through his committee work, scholarship, presentations, and mentoring activities.

Richard joined the American Association of Law Libraries (AALL) in 1985 and the Technical Services Special Interest Section (TS-SIS) in 1991. Since that time, his service within our profession has been prolific, with a particular emphasis on mentoring and promoting the next generation of law librarians. Within TS-SIS, he served as a member of the Strategic Planning Committee and Bylaws Revision Committee, and he served as an editorial board representative for the *Technical Services Law Librarian*. He has also carried the technical services flag as a member and leader within numerous other special interest sections. He served on the Online Bibliographic Services Special Interest Section (OBS-SIS) Executive Board from 2001 to 2006, including as Chair in 2005-2006, and was a longtime member of the OBS Education Committee. He served as Vice-Chair and Chair of the Social Responsibilities Special Interest Section (SR-SIS) from 2010 to 2012, and he chaired its Standing Committee on Lesbian and Gay Issues. He has been an active member of Academic Law Libraries Special Interest Section (ALL-SIS) and the Automation & Scientific Development SIS.

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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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Emily Dust Nimsakont
University of Nebraska

Web Advisory Committee:

Barbara Ginzburg
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T echnical Services Special Interest Section

Reflections from the Chair

This is my sixth and final column as Chair of the Technical Services Special Interest Section (TS-SIS), and I would like to reflect on what we have accomplished during my tenure. Last Spring, we initiated a review of the Standing Committees, as a follow-up to a previous review of Roundtables. Upon completion of the study, we had conversations in person and online. The TS Board took these conversations to heart, implemented changes, and determined the conversations were far from over. These few sentences don't express the hard work that was put into this re-organization by countless individuals, but I am truly excited for what has been accomplished by the members of the TS Board, the Special Committee to Review Standing Committees, and the current standing and administrative committees. Unfortunately, like many things in life, there is still much to do as we move forward with this transition.

This year, I have tried to communicate as openly as possible, but some of those attempts did not come to fruition. Thus, some accomplishments have remained concealed. To shed some light on what has happened behind the scenes: an updated 2018 version of the Handbook is now available on the TS-SIS website (a PDF is available here: <https://www.aallnet.org/tssis/about-us/handbook/>), and changes are beginning to be implemented on the website and within discussion forums. Officially, new discussion forums under the names Resource Management and Metadata Management will be launched after the Annual Meeting. New Co-Chairs will join the current Chair of the Cataloging and Classification Committee and Chair of the Serials Committee to lead our new Metadata Management and Resource Management Committees. Combining the Acquisitions, Preservation, and Serials Standing Committees means that new invitations to join the discussion forum will be sent later this summer.

I know my term has been a challenging time, and the ongoing saga with the cataloging liaisons is one that everyone wished was resolved. In spite of that, we continue to push forward, even if decisions do not go our way. The liaisons do still have the authority to continue the important work they have been pursuing for decades, and the Special Interest Section (SIS) Council will continue to pursue options to provide financial support. To that point, the SIS Council has created a second sub-committee to develop a plan to move forward and hopes to have a proposal for the Council-at-Large by the American Association of Law Libraries (AALL) Annual Meeting.

At times, these past months have been overwhelming, but what I have continually seen is how resilient we are as individuals and as a group. There have been bumps in the road, but we have adjusted our trajectory and made it to the destination. I believe we will continue to do so and that as standards and practices transform, TS-SIS will continue to evolve. Thank you for giving me the opportunity to Chair this group and for all of your support over the last year. The conversations about our roles and the structure of this interest section should gain momentum as our profession transforms. We are primed to advance this discussion, so please continue to reach out to your colleagues and debate the future directions of TS-SIS.

As we look forward to July, the focus turns to the educational and networking opportunities associated with the Annual Meeting. TS-SIS is hosting its first virtual Business Meeting in an effort to make the meeting more accessible. This meeting will include a conversation with members of the AALL Board with the goal of creating a greater understanding of the workings of the Association and its members. One added benefit of a virtual meeting is that a recording will be available after the fact for anyone who is unable to attend. If you will be in Baltimore, please consider attending the TS-SIS sponsored events. There will be many conversations and learning opportunities for both traditional and nontraditional TS librarians. Below is a list I've compiled if anyone needs some suggestions for interesting programs and meetings. I look forward to seeing you in Baltimore!

<p>Saturday, July 14</p> <ul style="list-style-type: none"> • The Magic of MarcEdit (9:00-5:00, W1) • Internal Assessment and Peer Benchmarking in Academic Law Libraries: The Advanced Session (1:00-5:00, W2) • Opening Reception (5:00-6:30) • Joint SIS Dine-Arounds (6:45) 	<p>Sunday, July 15</p> <ul style="list-style-type: none"> • Manipulating Data with OpenRefine (11:30-12:30, A2) • Rewriting the Rules of the Federal Depository Library Program: The Struggle to Amend 44 U.S.C. (11:30-12:30, A3) • We Made It Through! Before, During, and After the Disaster Hits: Improving the Disaster Plan After the Event (11:30-12:30, A6) • Law Repositories Caucus Meeting (12:45-2:15) • LIPA Business Meeting (12:45-2:15) • TS-SIS Acquisitions and Serials Roundtable (12:45-2:15) • TS-SIS Cataloging and Classification Committee Meeting (12:45-2:15) • APIs: What They Are and How to Use Them (2:30-5:00, B8) • TS-SIS Awards, Silent Auction, and Meet & Greet (5:15-6:30)
<p>Monday, July 16</p> <ul style="list-style-type: none"> • OBS-SIS OCLC Update Meeting (7:30-8:30) • TS-SIS Heads of Cataloging at Large Libraries Roundtable (7:30-8:45) • TS-SIS Management Issues Roundtable (7:30-8:45) • Library Services for Communities Living in Fear (10:00-11:00, D2) • Data Mining for Meaning: The Law and Corpus Linguistics Project (10:00-11:00, D3) • Special Collections Make for Special Relationships: Working with Your Institution to Bring Special Collections into the (UV-Filtered) Light (11:30-12:30, E2) • Compressing an Elephant: How We Shrank Acquisitions and Collections Workflows by Developing Our Own Best Practices for Operational Excellence (11:30-12:30, E7) • Digitization as Choose Your Own Adventure (2:00-3:00, F4) • Oh No, Not This Renewal Again: Using Electronic Resource Management to Take Control of Your Acquisitions (2:00-3:00, F7) • LHRB-SIS Rare Books Cataloging Roundtable (5:00-6:30) • OBS-SIS Hot Topic Forum on Systems Migration (5:00-6:00) • TS-SIS Hot Topic Forum on the RDA 3R Project (5:00-6:00 with TS VIP Kathy Glennan) • TS-SIS New Members Roundtables (6:15-7:00) 	<p>Tuesday, July 17</p> <ul style="list-style-type: none"> • TS-SIS Professional Development Committee Meeting (7:00-8:15) • TS-SIS General Roundtables (7:00-8:15; an opportunity to follow up on earlier programs and conversations) • OBS-SIS Local Systems User Groups Roundtable (7:15-8:15) • The PEGI Project: Preserving Electronic Government Information (8:30-9:30, G7) • FCIL Basics for Metadata Professionals: Collaborating to Ensure Access to Foreign and International Legal Materials (10:00-12:30, H1, TS-SIS Sponsored Program) • Telling Your Story: Using Metrics to Display Your Value (10:00-11:00, H2) • Setting Priorities, Meeting Deadlines, and Managing Projects for Law Librarians (11:30-12:30, I3) • Cool Tools Café (11:30-12:30, I5) • Bringing Culture Back: Managing Unconscious Bias to Strengthen Your Corporate Culture (11:30-12:30, I6) • TS-SIS Vendor-Supplied Records Advisory Working Group (VRAG) Meeting (2:45-4:00)

*Lauren Seney
William and Mary*

Online Bibliographic Services Special Interest Section

It is time for the familiar refrain of “I can’t believe how fast the year went by.” As I write this, exams recently finished at my institution, and it already feels like summer. I know that in the blink of an eye, July and the Annual Meeting will be here, and a lot of the Online Bibliographic Services Special Interest Section’s (OBS-SIS) efforts throughout the year will come to fruition in the form of meetings, discussions, and targeted educational programming, all coordinated by your fellow section members.

OBS-SIS’s Education Committee worked hard in submitting several program ideas this past fall. Two of those programs are on the agenda. We incorporated other useful content into our Hot Topic forum, meetings, and roundtables. I want to express my deep appreciation to our hard-working members, especially the Education Committee, the Executive Board, and all the committee chairs who worked so diligently, often behind-the-scenes, to get us set up for one of our best conferences yet (in my humble opinion).

Here are some highlights of what we have in store for Baltimore in July:

Alphabet Soup Dine-Arounds—Saturday, July 14th at around 6:45 pm

Start the conference off right by catching up with colleagues over dinner. Look for more information on signing up, and especially look for the OBS-SIS hosted dine-arounds that will include speakers from our programs.

Manipulating Data with OpenRefine—Sunday, July 15th at 11:30 am, BCC Room 343-344

Learn how to handle data more efficiently and effectively using OpenRefine. This free online tool allows users to quickly view, identify inconsistencies in, and enhance a variety of data, whether from a spreadsheet of contact information, MARC data, or the contents of a digital repository.

APIs: What They Are and How to Use Them—Sunday, July 15th at 2:30 pm, BCC Room 327-329

In this deep dive session, learn from three experts, who have used APIs (application programming interfaces) extensively in their libraries, about what APIs are, how they work, and what you can do with them.

OBS-SIS OCLC Update Meeting—Monday, July 16th at 7:30 am, Hilton Holiday Ballroom 3

An OCLC representative will fill us in on the latest OCLC developments, including new tools and initiatives that you can put to use in your library. Yes, it is early, but there will be coffee, tea, and juice.

OBS-SIS Hot Topic Forum: “When Systems Change”—Monday, July 16th at 5 pm, Hilton Carroll B

Is your library contemplating, planning for, or recovering from a system migration? Learn from a panel of those who have gone before you as they talk about their experiences, including what to expect, what to consider, and how to plan.

OBS-SIS Business Meeting—Monday, July 16th at 6 pm, Hilton Calloway A

We will be discussing important business. Certain members may appear in our special OBS-SIS baseball cap.

OBS-SIS Local Systems User Groups Roundtable—Tuesday, July 17th at 7:15 am, Hilton Brent

Discussions are grouped by library system so participants can talk about problems, ask questions, and compare notes. Everyone is welcome regardless of the library resource management system you use, and whether or not you are an OBS-SIS member. This roundtable is also a good opportunity to ask specific questions about a system that your institution might be considering.

As you can see, we will have many valuable learning opportunities at the conference in Baltimore. I hope to see all of you there!

Even though my term as OBS-SIS Chair has not yet ended, I know the time is coming up fast. We will hold our outgoing/incoming Executive Board meeting in late June. Therefore, I will take this opportunity to recognize and thank the 2017-2018 OBS-SIS Executive Board: Jackie Magagnosc, Vice-Chair/Chair Elect; Kevin Carey, Secretary/Treasurer; Patty Alwayay, Member-at-Large; Jason LeMay, Member at Large; and Marjorie Crawford, Past Chair. It has been a pleasure to work with this wonderful team, and I have learned a lot from all of you.

The 2018-2019 Executive Board will consist of Jackie Magagnosc, Chair; Jessica Pasquale, Vice-Chair/Chair Elect; Kevin Carey, Secretary/Treasurer; Jason LeMay, Member-at-Large, Barbara Szalkowski, Member-at-Large, and me, Past Chair. In a field that is constantly changing, OBS-SIS still has much to do to continue to evolve. I am confident that this 2018-2019 OBS-SIS leadership team is up to the challenge. As the long days of summer stretch out before us, we have a lot to look forward to ...

*Jennifer Noga
Wake Forest University*

Draft
Minutes of the Online Bibliographic Services (OBS-SIS)
Annual Business Meeting
Sunday, July 16, 2017, Austin, TX

Note: The OBS Business Meeting in Baltimore will vote on approving these minutes.

Call to Order/Welcome/Introductions:

OBS-SIS Chair Marjorie Crawford called the official meeting to order at 6:17 p.m.

Introductions: Marjorie Crawford, Rutgers University (outgoing Chair); Kevin Carey, Ohio State University (incoming Secretary/Treasurer); Karen Selden, University of Colorado (immediate Past Chair); Jackie Magagnosc, Cornell Law Library (outgoing Member-at-Large and incoming Vice Chair/Chair-Elect); Jennifer Noga, Wake Forest University (current Vice Chair and incoming Chair).

Audience introductions: Pat Sayre-McCoy, University of Chicago; Jason LeMay, Emory University (incoming Member-at-Large); Michael Maben, Indiana University; Meiling Li, Los Angeles County Law Library; Marijah Sroczynski, Milbank, Tweed, Hadley & McCloy; Gypsy Moody, Belmont University; Corinne Jaycox, Creighton University; Heather Buckwalter, Creighton University; Barbara Szalkowski, South Texas College of Law Houston.

Approval of 2016 Business Meeting minutes:

Marjorie Crawford called for a motion to approve the 2016 Business Meeting minutes. Pat Sayre-McCoy so moved, Jason LeMay seconded, motion passed.

Officer Reports:

Treasurer/Secretary – Melanie Cornell (not present):

Kevin reported that the OBS-SIS net meeting expenses for 2016 were \$2,506.04. The 2016-17 membership fees to date totaled to \$2,195.00. We started this year with a balance of \$5,483.68. Over the year we spent \$4,891.04 and received \$3,570.00, ending with \$4,162.64 as of June 21st. Our 2017 election ran April 24 to May 5 using AALL's voting software. 25% of members voted, the results were shared on May 5th. Congratulations to our newly elected positions: Vice-Chair/Chair-Elect: Jackie Magagnosc (Cornell Law Library), Member-at-Large: Jason LeMay (Emory University School of Law), Secretary-Treasurer: Kevin Carey (Moritz Law Library).

Members-at-Large – Jackie Magagnosc (2015-2017), (Patty Alvayay (2016-2018) not present):

Jackie reported that the first-year Member-at-Large is charged with being our representative to the Alphabet Soup reception, but this year Innovative declined to fund, so Patty heroically organized last night's Dine-Around at a distance, and her sense is that they were extremely successful; thought it was a really lovely opportunity to get people together on smaller scale and do that networking thing that we're supposed to do, and a lot of newer members came.

Second-year Member-at-Large had especially to do with the posters, and getting the posters up, and people have signed up to stand with it during the exhibit hall breaks, so that's good.

Vice-Chair/Chair-Elect – Jennifer Noga:

Jennifer reported that her main initiative for this last year was the OBS survey, and that we got a lot of really good information out of that survey, and we do that every other year, alternating off with TS [Technical Services Special Interest Section] and

their survey. So we would have liked to have more responses, but we got about 50 people, which was pretty good, not a bad survey response rate actually. We got a lot of good feedback to go off of for next year, and planning for the section for next year, and we also got a lot of good ideas for programming, and we talked about a lot of those ideas this morning at the Education meeting, and so we have a number of really good things in the works for programming for the upcoming year. So that was a really great thing to have that information directly from the members about what they want to see in terms of professional development.

Then in the latter half of the year, Jennifer was primarily focused on getting commitments for committees, and so we have a number of people who are stepping into new chairs of committees positions: Keiko Okuhara, chair of the Local Systems Committee; Gypsy Moody, chair of the OBS/TS Frog Committee; also two new reps on that committee, Lisa Watson and Rachel Decker; Emily Dust Nimsakont, chair of the OCLC Committee; Larissa Sullivant, TSLI board representative.

Chair – Marjorie E. Crawford:

Marjorie reported on one OBS initiative for discussion at the business meeting. Since the AALL [American Association of Law Libraries] board decided to cut funding for the three cataloging reps, which presents a problem to TS and OBS, we worked all year but we still don't have a resolution that we are happy with, and I think it is important for the AALL board to hear one voice from us as to how we think we should go forward. Marjorie opened the floor to listen to the membership.

This topic was brought up at the SIS Council meeting on Saturday, by the outgoing chair of ALL-SIS [Academic Law Libraries], as something very important for all the SISs to get behind and support these representatives and communicate to AALL how important they are, and everyone who was there agreed. TS-SIS and ALL-SIS are both very supportive and want to be proactive in making sure these reps can at least retain the positions, although to be designated as "liaisons" rather than "representatives." It was suggested that the SISs could create an endowment to fund the liaisons, or possibly a special subcommittee between OBS and TS to further consider the matter.

Committee Reports:

Education Committee – Marjorie Crawford, Chair:

Marjorie reported on the current Annual Meeting program for AALL: thanks to Barbara Szalkowski, we had a great start. The program today was independently sponsored by OBS, and this is all due to Barbara taking the initiative. We need to have more Barbaras in our midst, to step up and see what we can do, once we put our minds to moving ahead. We participated in CONELL: Jean represented us. So we're off to a great start to this annual meeting.

OBS/TS FROG (Research Grant) Committee – Representatives: (Virginia Bryant (2015-2017), not present), Gypsy Moody (2016-2018):

Gypsy reported on FROG: we actually had an applicant for the first time in 13 years, and she brought a project which we considered and ended up funding her. We're very excited to see how much she can accomplish. Her name is Sarah Lin, and she's a firm librarian in San Francisco [Reed Smith].

Local Systems Committee – Kevin Carey, Chair

Kevin reported on the Local Systems Committee, which mostly focused as usual on the roundtable event today, and we followed up on some of the outcomes from last year, like the ALMA folks who were most interested in getting together, and tried to cast a bit of a wider net in the past weeks and months. We don't know how successful that necessarily was, but it was a reasonably lively discussion by people who are mostly on ALMA or moving to ALMA earlier today. We could consider condensing the format to a single table, as we tried to provide tables for several different user groups but ended up with 2-3 rows around one table. Follow-up question: is there possible interest in a Folio user group?

Nominating Committee – Scott Matheson, Chair (not present)

Marjorie thanked the committee for proposing a slate of candidates that we voted on who will be serving us at the end of this term. It was success, success, success.

OCLC Committee – Jason LeMay, Chair

Jason reported that the OCLC meeting is tomorrow morning at 7:30 a.m., with coffee, tea, orange juice.

OBS TSLI Editorial Board Representatives – (Caitlyn Lam (2015-2017), Sara E. Campbell (2016-2018), not present)

TSSL Report – Michael Maben

Michael reported that the *Tech Services Law Librarian* published 4 issues last year, all published on time. We had some columnist changes, and an associate editor change, and we've got people lined up to review programs for this meeting, and hope to publish those in the September issue. This next year will be Michael's last year, as the board already knows, so he will be working on lining up successors.

Web Advisory – Barbara Ginzburg (not present)

Marjorie thanked Barbara and the committee for moving OBS forward with the new AALL site.

New Business:

2017 OBS VIP:

Barbara Szalkowski reported that Scott Carlson was delighted to be here and is staying through Tuesday morning: he is getting his fill of what we are about here, and was pleased to meet everyone and getting a different perspective than he usually gets at ALA. Everyone was very receptive to him, so we got good exposure on both ends. There were 110 people at his morning program, so thanks to everyone for the support.

Other:

Marjorie Crawford presented thank-you cards to three outgoing board members, along with the traditional OBS Chair's hat to Jennifer. Jennifer thanked Marjorie for her dedication and commitment in serving two years as OBS-SIS Chair, for her leadership and for serving our members so well, in a difficult time. Jennifer presented a plaque as acknowledgement, along with a gift, and said that it was her privilege to be Vice Chair under Marjorie and learn from her.

Jennifer ran the drawing for a free OBS-SIS membership from the CONELL attendees. The winner was Elizabeth Manriquez. Jennifer will follow up with Elizabeth about the free membership, as well as contacting the other people about joining OBS.

Adjournment:

Jennifer Noga called for a motion to adjourn. Karen Selden so moved, Michael Maben (et al.) seconded, motion passed. The meeting was adjourned at 7:07 p.m.

Respectfully submitted:

Kevin Carey, OBS-SIS Secretary/Treasurer, 2017-2019

A Multi-Part ILS or Management System
Needs Exploration for Acquisitions, Part 3:
Invoicing & Budget, Data & Reporting, and
Training & Continuing Education

ACQUISITIONS

Luz Verguizas
Columbia University

In Part I of this article, published in the December 2017 issue of the *Technical Services Law Librarian*, I discussed the need for standards for acquisitions, as well as the functional requirements which would form the basis for my investigation into the needs for an acquisitions module of an ILS or library management system. In Part II, I discussed the first three areas that should be considered when evaluating a new ILS: selection & pre-order searching, order & order maintenance, and receiving & claiming. In Part III, the last section, I will go over the last three areas for consideration.

Invoicing & Budget

After selection and ordering, usually comes the invoicing and payment process. If your desired workflow consists of more than one person paying vendor invoices at any given moment, an important consideration would be the ability for multiple users to have simultaneous access to the invoice interface. There are times when a vendor applies a miscellaneous charge to your library's account for which there is no applicable direct order record. In cases such as these, the ability to create both regular and 'x-type' invoices can be very helpful (x-type invoicing refers to invoices without a purchase order number, e.g. direct charges to a fund). Following is a table of some more common invoice fields that should be available with most invoice modules:

Invoice fields

Invoice number	Publisher	Invoice subtotal
Invoice type	Publication date	Shipping charges
Shipping vendor name	Number of copies ordered	Service charge
Billing vendor (may be different than shipping vendor)	Number of copies paid or received	Invoice total
Library account number	Number of copies available for payment	Vendor order was placed with
Purchase order number	Number of copies being paid for	Fund or special project name
Title	Amount	Price (regular or discount)
Author	Notes (minimum 60 spaces)	Item format

Once an invoice is paid, there should be duplication detection, which would safeguard multiple entries of the same invoice or payment for the same order. When entering the invoice number and vendor name, the system should notify the user if there are existing payments. The ability to denote partial payments should also be available while maintaining any encumbrances with the remaining balance clearly visible. After posting all invoices, a record of the transactions should be available in a printable or exportable report containing the financial details for each of the invoices and a summary sheet reflecting the changes to encumbrances and cash balances.

One way many libraries have been able to streamline their acquisitions workflows is via electronic invoicing. If your library imports invoices electronically (or plans to do so sometime in the near future), the ability to receive electronic packing slips and/or invoices, by purchase order or invoice number, will need to be a requirement. Often, you must make changes to vendor invoices due to a return, cancellation, or vendor error. As a result, it is important to note that with this functionality, you should also have the ability to edit the number of copies, amount due, freight and service charges, and tax, as well as the ability to delete line items and recalculate total amounts. Lastly, link invoices and vendors. The system should have the ability to search invoices by invoice number or vendor name, with invoice records including links to vendors and vendor records including links to invoice history.

At the center of Acquisitions is the budget. The ability to easily and accurately track your library's finances is crucial. At a minimum, an ILS or library management system should have the ability to keep track of the budget as a whole, assign allocations, and add encumbrances. Consider how your library's funds should ideally be structured. In its current iteration, is the fund hierarchy working well for your organization? If it is not, this would be an excellent time to determine what exactly needs to change. Make certain that the types of information you would like tracked in your finances, be it the material's subject, format, order type, or package type, can be done. Your library may have various sources of funding, from the institutions central budget, endowments, grants, or gifts; you will need to ensure that the system you choose offers you the option to track funding sources, both separately and as a whole.

If your department works directly with your institution's finance team or would like to eventually have the option to do so, then direct interface with those financial systems will be key. This functionality will enable you to interface directly with the financial system to manage funds, invoices, purchase orders, and payments. Dependent upon existing workflows, having the ability to batch load invoice data into your institution's financial system may cut down on staff time by eliminating the rekeying of invoice data. According to an article on the Free/Open Source Software for Libraries website, it is important to "understand the financial reporting requirements of your library and its wider organisation. When are reports due, what needs to be presented and in what format / fashion? An ILS [Integrated Library System] revision presents an opportunity to review reporting practice, what is required, what is redundant, and what you think you actually need to know to do your job better. Such a gap analysis can inform required and desirable functionality" ("Software Selection Methodology for Integrated Library Systems").

Another feature which can be very helpful is the ability of a system to manage multiple fiscal years simultaneously. This way, if you have already stopped paying items for the current fiscal year and are merely awaiting the availability of fiscal year-end reports from your institution before performing the fiscal close, you can begin working in the new fiscal year immediately. This would enable you to remit payments to your vendors in a more timely fashion, avoiding the seemingly inevitable windfall of invoices that pile up at the end of the fiscal year. Following are some additional considerations with regard to invoicing and finances:

- What are the various fund attributes?
 - Does the system support an unlimited number of funds? Can funds be grouped together in multiple hierarchies?

-
- Can multiple funds be used in a single order?
 - Does the system trigger an alert when fund balances go below a configurable level?
 - Can money be transferred between funds with appropriate privileges?
 - Can inactive funds be deleted with appropriate privileges?
 - How are funds carried over from one fiscal year to another in the system?
 - At the end of the fiscal year, can encumbered funds be brought forward into the new fiscal year?
 - Do all transactions post in real-time (including purchase orders, invoices, fund balances, vendor balances, vendor statistics and history)?

Data & Reporting

One of the most frustrating things for any librarian is knowing that your ILS has the information you need stored somewhere, but you just cannot seem to get to it. An ILS should offer flexible reporting. All reports need to be able to include the ability to sort, filter, and limit on desired fields. Likewise, the report output should provide the option to print or output to a file in a standard format such as CSV (Comma Separated Values). Keyword searching capabilities should be robust. When reviewing options for a new system, think of the searches that have given you trouble in the past and, if possible, run those in the sandbox version of the system you are considering to see if the process is more or less painful than it was in your old one. Searching and reporting should provide you with the options to get an overview of the information you need, and, dependent upon your needs, a more granular view of more specific details, such as spending on a range of call numbers and specific formats over the course of several years.

Next generation ILSs seem to tout their reporting capabilities, so the expectation would be that this is a high standard across the board. In a research project launched by Ithaka S+R with the support of the Andrew W. Mellon Foundation, Director, Libraries and Scholarly Communication Program, Roger C. Schonfeld, and Analyst, Libraries and Scholarly Communication, Liam Sweeney, sought to gather data on the distribution and acquisition of materials in the academic library sector. According to Schonfeld, “if the standardization across institutional implementations meant that certain key variables could be tracked in a uniform manner, perhaps a single query or set of queries could be run across dozens of institutions using the same next generation ILS” (Schonfeld). The results of their research were interesting. Per Schonfeld:

Among the cloud ILS packages that have come into use among academic libraries, we found the experience to be extremely variable. For example, we worked with several libraries running Innovative’s Sierra to generate identical reports on their acquisitions. We found that, although the reports were identical, some of the specific coding was highly variable from institution to institution in a way that would make broad comparative analysis across dozens of institutions complicated if not impossible.

On the other hand, the reports that resulted from those institutions using Alma were quite different:

We undertook a similar exercise with several libraries that run Ex Libris’s Alma package, working through its very helpful product working group. We found that not only were the results from multiple Alma libraries highly standardized in a way that would ease comparability but also that the query itself could be readily shared from library to library from within the Alma system, eliminating the need for it to be recoded every time another library wanted to join our research effort. (Schonfeld)

He concluded that “cloud based ILSs certainly aren’t designed to accommodate the type of research we are conducting” (Schonfeld).

Although some might argue that Schonfeld’s conclusion points to the fact that reporting should be kept simple (i.e., canned reports), for many libraries, reporting needs to be highly customizable, with the ability for saved searches and queries and scheduled reporting. Following are some examples of the types of reports you may want to run:

- Fund Reports: appropriation, encumbrances, expenditures, % encumbered, % expended, number of items paid for, and average cost per item.
- Cost Per Fund Report: amount spent per fund, including average discount and average cost.
- Spent for Location Report: Amount spent per month per location.
- Vendor Report: order fill rate, average order fill time, number of vendor cancellations, number of library initiated cancellations
- Analysis of vendor performance with reports including speed of delivery, order fulfillment, average discounts, and error rates

Another consideration is how easily transferrable your data is from one system to another, whether that is into an in-house system, an ERM, or in the event you migrate later on:

Integration with other in house systems can utilise a number of mechanisms from simple exports of ledger information in CSV format or more complex automated interaction using standardised or custom APIs [Application Programming Interfaces]. Understanding the systems environment in which an ILS can operate is vital, especially the mechanisms for interaction supported. Can an ILS support these mechanisms 'out of the box' or is additional integration work required? Beware of customised functionality provided by proprietary vendors; it often comes at a great cost over time ("Software Selection Methodology for Integrated Library Systems").

Training and Continuing Education

A system only works well if its users are adequately trained on it. Many providers offer training that is included with the adoption of the system; many times, this initial training is offered free of charge. Although often offered, more specialized training comes at a cost. This is where ILS user groups and instructional videos on blogs or even YouTube can be helpful. Once completing the initial training, it is always a good idea to offer periodic refresher courses and keep tabs of user group listservs. Becoming actively involved in the discussion between your ILS provider and its community can also help you initiate change. The most important thing is to keep the lines of communication open between yourself and the community, making sure to keep abreast of new developments and knowing whom the key stakeholders are.

Clearly, there are many other factors that come into play when choosing an ILS, not the least of which is cost and, perhaps most importantly, outside pressures. Regardless of these, we need to be prepared with the best possible knowledge going into an endeavor such as this. We need to think critically and practically; it is, after all, an investment in our future. The more research and substantiating evidence we can provide to our constituents, the better. In his article, "Sound and Fury: Buying Open Source v. Proprietary ILS," Rogan Hamby summarizes it perfectly:

As we look critically at these solutions, their vendors, and communities, we also have to look to the future. We need a sense of how the future of these ILSs will unfold since we will be tied to one once we make that selection. Communities and companies can be filled with amazing people who can make all the difference, but they can also fall apart. Engagement with partners in companies and communities are where we will see the future unfolding. (Hamby, 33)

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Space Insurance and How it Complicates LCC

CLASSIFICATION

Aaron Kuperman
Library of Congress

This is not an official policy statement from the Library of Congress, though one hopes it will trigger a decision by the Policy and Standards Division on this subject.

This started when a Polish insurance lawyer wrote a book on “Space insurance” and it was published by a major European publisher. Not a thesis, not connected to her law practice directly, though I suspect she might want to “get in on the ground floor” of a new area of law. It appears to be the first comprehensive treatise on the subject.

Subject headings are not a problem, as any heading for an established industry that can be insured allows use of the “free-floater” for “Insurance,” which, in turn, allows a free-floating “Law and legislation.” We might want to create a heading for “Space insurance” on the pattern of “Maritime insurance,” but it is no big deal.

However, where to class it? One’s first thought is “we keep insurance law together” rather than with what is being insured, and since the book is not specific to any jurisdiction, that takes us to K1241-K1287 for insurance law, which is indented under commercial law (since insurance is a type of commercial contract). However, one should notice the similarities to “Marine insurance,” which classes at K1226-K1231 in the “Maritime law” area (also under commercial law, since maritime law is about maritime commercial contracts). Marine insurance, like Maritime law, goes back to antiquity, and they evolved together, which might explain why it classes with the subject rather than with insurance law.

So, what is the equivalent area for “Maritime law” for outer space? This now starts to get into philosophy. KZD is for “Space law,” but is it for the “public international law” of outer space (just as KZA is for the public international law of the sea, but not maritime commercial law)? Now, we have to ask about the distinction between “public” (international) and “private” (transnational, comparative, and general) law. And if not KZD, where in K?

There is already a place in KZD for the law of commercial activities in space at KZD4050. But there is also place in K, in the transportation area (not the commercial law area) for the law of commercial activities in space K4135 (with a note saying the KZD is for the “law of outer space.”). One of these needs to be cancelled and the other radically expanded to reflect that commercial use of outer space is increasing. There is room to expand the range for commercial use of outer space in either KZD4050-4080 or in K4135-4050. This sort of development is probably too big to attempt without prior approval for LC’s Policy and Support Division.

Complicating matters is that the distinction reflects the dichotomy between public and private law, a distinction that can be quite philosophical and bizarre to Americans since the Common Law tradition doesn’t make the distinction, although maritime law is a unique case since it is a piece of ancient customary law grafted onto modern legal systems. Also, note the separate area for “Water transportation and shipping” in the regulation of transportation area at K4150-K4226, which is in itself confusing if one is unaware of the historical context for distinguishing the commercial law of the sea from the regulation of transportation on the sea, not to mention the “Law of the sea.” Perhaps we need to decide that the “high seas” are not a good pattern for classification of the law of “outer space.”

One way of looking at the schedules is to understand that KZ is for “public international law” (meaning KZD is the public international law of space, i.e. the laws made by and regulating behaviors by countries), and K is for “transnational” (as well as comparative) law. If we look at things this way, space commercial law classes in K, perhaps in a “Commercial aeronautics” area. Resources about corporations functioning in space, making commercial contracts, or products liability would stay in “K,” while international agreements governing ownership of territory, criminal law, or rules of navigation would be in KZD, leaving open the idea whether K numbers for down to earth subjects should be used for space (if at some point most corporations routinely do extraterrestrial business, then why make a distinction between “space” corporations and planet-bound ones, resulting in classing them in K by subject, bringing out the “space” aspects only with subject headings). The KZD distinction will parallel the KZ distinction with K. We are treating “space” as a regime of public law (similar to KZA) while leaving commercial concerns in K.

The alternative will treat KZD as a “jurisdiction,” meaning that anything involved with space classes there, even if it is a mundane commercial matter that has nothing to do with the fact that it is in outer space, e.g. need for written contracts in space, custody of children in space, liability for defective goods in space, etc. Some materials now going to K numbers will be moved to KZD. In theory, the problem with this approach is that there is no legal system for outer space, and even if

one evolves (in the common law model) or is established by legislation (in the civil law model), we cannot classify books written today based on what we think will happen in the future.

And this still leaves the question about space-related insurance. Most insurance classes in the insurance range in K, except for marine insurance. Note that the insurance numbers are largely arranged by the type of insurance and the risk being insured against, not the nature of the industry or where the risk is incurred. However, the type of insurance that is similar to space insurance is marine insurance—they both insure vessels carrying cargos and passengers in a place that is beyond the control of any jurisdiction’s legal system, and marine insurance is classed with maritime commercial law, not with insurance law.

If we decide to treat space insurance similar to marine insurance, we then have to figure out where commercial space law (the equivalent of maritime law) classes, so we have to address the problem that the law of commercial activity in space has numbers in both KZD and K, and once we settle on where to class commercial contracts involving outer space, we can then insert a number for space insurance in whichever one we decided on.

One can argue that space insurance should stay in the insurance law area, but it turns out that books on insurance by industry do not have a place there (perhaps this also needs to be ameliorated). There is a number for aviation insurance, but it is clear that even though it has been used for works on insurance in the aviation industry, the indentation indicates the number is limited to cargo insurance or to “flight insurance” sold at airports to paranoid air travelers. There are numbers in the schedules for “Business insurance,” such as KF1189.5 and especially KD1879 (which includes a note to class insurance for specific industries), but in any event, if we want to class the book in K, it will still require proposals.

The powers that be need to decide where they want commercial law pertaining to space to class: philosophizing about “public vs private” law, “regimes vs jurisdictions,” whether space insurance should class with insurance law or with the commercial space law, and deciding if maritime law a valid pattern for space law.

COLLECTION DEVELOPMENT

HathiTrust and the Law

*Adrienne DeWitt
Campbell University*

The past few months, my library has been doing a lot of historical legal research. Like most libraries, we use *HeinOnline* and *The Making of Modern Law*, but lately, we have found HathiTrust to be an excellent resource, especially when it comes to searching old state codes. In fact, we have had so much success with it that now it is practically the first database we use when looking for early American law.

HathiTrust is a repository of digital content from research libraries, Google Books, and the Internet Archive digitization initiatives. Started in 2008, the repository is administered by Indiana University and the University of Michigan; it was conceived as “a partnership of major research institutions and libraries working to ensure that the cultural record is preserved and accessible long into the future” (<https://www.hathitrust.org/about>). The name “Hathi” was chosen because it is the Hindi word for *elephant*. To date, HathiTrust has digitized over sixteen million volumes (https://www.hathitrust.org/statistics_info).

In 2011, the Authors Guild sued Hathi for copyright infringement (*Author’s Guild Inc. v. HathiTrust*, 755 F.3d 87 (2d Cir. 2014)). The Court held that digitalization of books was permissible under the doctrine of Fair Use. You can read more about the suit and legal analysis at https://www.hathitrust.org/authors_guild_lawsuit_information.

Today, HathiTrust offers academic and research institutions the opportunity to join its partnership. Individuals, however, can access repository materials without having a membership, but there are restrictions. For example, we found an early copy of the *Laws of North Carolina* on HathiTrust at <https://bit.ly/2rY6W5G>. Our individual access allowed us to download the page viewed, but to download the book, we needed to be a “partner institution.” This was surprising, considering the same title was in the public domain and was Google digitized. A quick search found the same title on Google Books available in a downloadable PDF. It is accessible at <https://bit.ly/2J04zsU>.

As an individual researcher, I do not generally need to download an entire volume, so the partnership requirement was not burdensome. In addition, HathiTrust provides a thorough explanation of available content for those without sign-in privileges:

All users can do the following without logging in:

- Search across the entire collection;
- Read and view works that are “full-view;”
- Search within works that are “limited (search-only);”
- Download a single page at a time from works that have download restrictions (e.g., works that are in the public domain but were digitized by Google or other vendors with contractual limitations);
- Download an entire work that does not have download restrictions (e.g., works digitized by Internet Archive and other organizations, works that have been opened with a Creative Commons license)

From *Help Using the Digital Library*: https://www.hathitrust.org/help_digital_library#NoLogin

For those interested, partnerships are available to qualifying institutions. There is an annual membership fee, based on an algorithm involving several “fixed” elements, including “the number of public domain volumes in HathiTrust, the number of in-copyright volumes in a partner’s print holdings that overlap with HathiTrust digital holdings, the number of partners that hold a particular copyright volume, and the number of partners.” For a complete list of elements and other pricing information, see <https://www.hathitrust.org/cost>.

To learn more about HathiTrust, see <https://www.hathitrust.org/about>.

DESCRIPTION & ENTRY

Shucking Metadata for the Sake of Preservation: A Tiny Case Study of Dublin Core

Jesse Lambertson
Georgetown University

As Georgetown Law Library jointly spearheads the migration of what was formerly The Chesapeake Collection, a ContentDM preservation archive of legal materials, to the Legal Information Preservation Alliance archive in Preservica, those of us who handle the processing and metadata for the local contributions to this collection must migrate processes from Qualified DublinCore (DC) (ContentDM) to Simple DC (Preservica).

The original local cataloging takes place in MARC, but then must be mapped to DC (for either ContentDM or for Preservica). This process was built into the procedure by which the digital objects and the metadata were uploaded into the dark archive. However, in Preservica, the process of converting the Marc21 to Simple DC is a standalone action.

We reach for our trusty MarcEdit for part of this process, as it includes a tool to convert schema to schema.

First, we look at the differences between the Qualified DC exported from ContentDM (the migrated metadata along with their objects) against the Simple DC (used for all newly preserved objects).

Here are three examples that denote the difference in the metadata export from ContentDM and the Conversion from Marc to simple DC.

Example 1.

In each exported batch of ContentDM metadata per-object

```
<structure></structure>
```

The tag carries the URL for the entire resource, an administratively controlled URL—tied specifically to ContentDM servers, and that would not be in the original MARC record being converted to DC.

But Simple DC does not contain a tag named as such.

Example 2.

The Marc=>DC Conversion for the resource:

“10 reasons to oppose the criminalization of HIV exposure or transmission”

<dc:subject> HIV infections--Transmission--Criminal provisions.; HIV infections--Social aspects.; HIV-positive persons--Legal status, laws, etc.; AIDS (Disease)--Transmission--Criminal provisions.; AIDS (Disease)--Social aspects.; Medical care--Law and legislation--Criminal provisions.; Criminal justice, Administration of.; Sexually transmitted diseases--Law and legislation.; Liability (Law) </dc:subject>

The exported subject headings from ContentDM concatenate all subjects into a clean, single-line entry.

Simple DC, at least in the MarcEdit conversion, uses <xsl:for-each...> and does not concatenate (producing a 1 : 1 ratio between MARC subject field tag and DC tag).

**<dc:subject>HIV infections</dc:subject>
<dc:subject>HIV infections</dc:subject>
<dc:subject>HIV infections</dc:subject>
<dc:subject>HIV-positive persons</dc:subject>
<dc:subject>AIDS (Disease)</dc:subject>
<dc:subject>AIDS (Disease)</dc:subject>
<dc:subject>Medical care</dc:subject>
<dc:subject>Criminal justice, Administration of.</dc:subject>
<dc:subject>Sexually transmitted diseases</dc:subject>
<dc:subject>Liability (Law)</dc:subject>**

The results are technically correct, but leave much to be desired in a web-based interface for subject access. We are planning to experiment with the XSL later – <and If we can write new XSL for this conversion>, we will put it in place only for newly preserved born-digital legal materials.

Example 3.

“Preventing crime: what works, what doesn’t, what’s promising”

<dc:contributor>Sherman, Lawrence W.,; Gottfredson, Denise C.,; MacKenzie, Doris L.,; Eck, John.,; Reuter, Peter, 1944-; Bushway, Shawn.,; National Institute of Justice (U.S.),; University of Maryland at College Park. Department of Criminology and Criminal Justice.,; U.S. Government Printing Office</dc:contributor>

Not only does the exported Qualified DC concatenate into a neat string of strings, but these entities mapped to <dc:contributor> instead of <dc:creator>.

In the Marc=>DC Conversion:

**<dc:creator>Sherman, Lawrence W.,author.</dc:creator>
<dc:creator>Gottfredson, Denise C.,author.</dc:creator>
<dc:creator>MacKenzie, Doris L.,author.</dc:creator>
<dc:creator>Eck, John,author.</dc:creator>
<dc:creator>Reuter, Peter,1944-author.</dc:creator>
<dc:creator>Bushway, Shawn,author.</dc:creator>
<dc:creator>National Institute of Justice (U.S.),sponsoring body.</dc:creator>
<dc:creator>University of Maryland at College Park.Department of Criminology and Criminal Justice.</dc:creator>**

Both conversions originated from the same MARC record. One went through the Qualified DC XSL written by OCLC, and the other one went through the XSL added to MarcEdit—but they do not output the same information. It is good the Simple DC Conversion keeps the MARC relator terms (we all like the granularity inherent in MARC)—but these are MARC Relator terms, not DC relator terms. They will not work the same way in a non-MARC based interface with the same legal materials.

So...the work of migrating the content and metadata from ContentDM to Preservica is underway, and we will make use of current conversion settings (probably) for the time being. But this is a work-in-progress. I look forward to potentially making use of customization to the DC and its XML—perhaps for a future Description & Entry Column...

Thank you

Net Neutrality Update

Wilhelmina Randtke
Florida Virtual Campus

What is Net Neutrality

Net neutrality is the principle that Internet service providers (ISPs) will not preference some sites or sources of traffic over others.

For example, an ISP might allow a website to pay a fee and have that website whitelisted into a faster download bracket or a bracket where that content would not count against customers' data caps, or they might charge websites a fee to be available to ISP customers at all. Alternatively, for example, an ISP might also produce its own content and run something like an in-house Netflix, and then not count access to that against customers' data caps.

Two real world realities affect how this would play out.

The difference in speed would likely be great. Fast versus slow; not super-fast versus okay. Think about your cell phone plan and your data plan. When you buy data in 2018, you generally are buying a certain amount of high-speed data. Once you hit that cap in a month, you get data, but not high speed. It is a dramatic difference, and that is the kind of data difference to expect for preferred versus not-preferred content in an absence of net neutrality.

Customers accessing the Internet often have little or no choice of company. The majority of people in the U.S. have only one or two ISPs to choose from that can service their postal address. Most reporting about this lack of choice cites back to Figure 5 of the Federal Communication Commission's (FCC) Industry Analysis and Technology Division Wireline Competition Bureau's report on *Internet Access Services: Status as of June 30, 2015*, available at https://apps.fcc.gov/edocs_public/attachmatch/DOC-340664A1.pdf. For someone with only one ISP servicing their postal address, if that ISP does not provide access to certain content, the person has no alternative way to buy the access. Therefore, if an ISP chooses what content to allow passing through to consumers, consumers likely will not have an alternate way to get the excluded content.

Industry

Industry breaks into two overlapping categories. First, there are ISPs. Since they tend to have monopolies over specific geographical areas, each would like additional income streams from content providers/publishers. This puts them against net neutrality regulations. Second, there are content providers/publishers. In the absence of net neutrality, they would likely have to pay additional fees to ISPs in order to get their content to customers. They tend to support net neutrality. There is some overlap. For example, Comcast owns NBC. Comcast is an ISP while NBC is a content provider/publisher. Overlap might play out in terms of ISPs always preferencing content from subsidiaries.

Why this matters for libraries

More and more library content is digital as opposed to print. Speed matters for online legal information. Pure text like a .txt file may be fine at low speeds. Even though law is largely textual information, scanned images of pages are the basis of databases like HeinOnline and Bloomberg Law. Instructional videos and video tutorials are ubiquitous in legal research and in state bar CLE (continuing legal education) programs. Webpages pretty much have to have pictures and graphics to look normal and not off-putting to people coming to the page.

In the absence of regulations requiring net neutrality, there is a chance that legal publishers would have to pay in order to let their websites be loaded online.

When libraries license electronic resources from a vendor, the library pays for Internet access (through the campus, law firm, or larger organization), and then the library pays for licensing the content. The library is paying to be able to receive information over the Internet. If an ISP is able to charge the vendors and require a fee in order for those vendors to send out content over that ISP's lines, then that is an extra cost for each vendor. The vendor has to pay to be able to send the content to the library. It is an extra cost that the vendor would pass on to the library in the form of higher subscription prices.

When libraries publish their own materials, for example by digitization projects or institutional repositories or by posting instructional videos, it might be the case that ISPs require the library to pay in order to send that info out to the public.

Even though any given postal address may only have one or two options for ISPs who offer service in that geographic area, it usually will be the case that a publisher is looking to reach several far apart geographic areas and would therefore have to pay multiple ISPs. The complexity of analyzing how to do this would likely be easier for large publishers and more difficult for small organizations like smaller publishers and individual libraries.

It might also be the case that it is not possible for a publisher to contract with ISPs in order to have a way to distribute content. In a total absence of net neutrality laws and regulation, there would not be a requirement for ISPs to price fairly or to contract at all with content providers/publishers. This could be a significant barrier to smaller publishers and to new websites and services.

For libraries, this is not an abstract public policy issue. Instead, it is key to how people get content.

Public Awareness of Net Neutrality

Historically, net neutrality has been a minor issue for the general public and has only been front and center or even on the radar for the tech industry rather than industry in general. That changed as first computers and then smart phones became ubiquitous.

The specific kind of technology that regular people are using matters. The government broke up AT&T in the 1980s, through government action on phone lines. In the 1990s and early 2000s, before Ethernet became common, Internet access was through phone lines. The early Internet had net neutrality built in as an artifact of restrictions on phone companies in place with the goal of breaking up the AT&T phone monopoly from the 1960s. Since around 2000, there has been a gradual shift in Internet access away from dial up to broadband. Then there has been a shift to cell phones. Because the underlying technology is different, regulations to break up the 1960s AT&T monopoly do not affect the vast majority of Internet use today. Along with those shifts in underlying policy, more and more people are Internet-connected such that today in the U.S., the majority of people use the Internet regularly for day-to-day tasks like watching videos and buying things.

Public awareness of net neutrality probably has emerged with consumption of streaming video and with ubiquitous smart phone access, where regular people shop for speed and shop for total amounts of data. When people buy a cell phone data plan, the monthly data cap is usually for high-speed internet access. Regular people understand that fast Internet and slow Internet is not a difference of fast versus almost-as-fast, but rather a difference of works well versus painfully slow.

Likewise, as online access and activity has become the norm for the general public, a broader industry group has emerged. Online sales have to take place over the Internet, so almost any business using the Internet to reach customers has a stake in reaching those customers with the fewest barriers possible.

Politics and Net Neutrality

Historically, net neutrality has not been a partisan issue. Individual politicians have each tended to go with lobbyists and donors working specifically with them. ISPs have big money, but so do content providers. In addition, the issue historically did not matter for the public and only started to matter as more and more people have gotten Internet access.

Recent History of Net Neutrality

On June 12, 2015, the FCC's net neutrality regulations took effect. These regulations are available in the FCC; *Protecting and Promoting the Open Internet*, 80 Fed. Reg. 19,737 (Apr. 13, 2015). The summary for these regulations states in part, "In this document, the Federal Communications Commission (Commission) establishes rules to protect and promote the open Internet. Specifically, the Open Internet Order adopts bright-line rules that prohibit blocking, throttling, and paid prioritization; a rule preventing broadband providers from unreasonably interfering or disadvantaging consumers or edge providers from reaching one another on the Internet; and provides for enhanced transparency into network management practices, network performance, and commercial terms of broadband Internet access service. These rules apply to both fixed and mobile broadband Internet access services."

Those regulations held up to challenge in court: *United States Telecom Ass'n v. FCC*, 825 F.3d 674 (D.C. Cir. 2016).

In April 2017, the FCC opened public comments on whether or not to repeal the net neutrality regulations. In Fall 2017, the FCC began rulemaking to repeal the net neutrality regulations. On February 22, 2018, the FCC published new regulations rolling back the 2015 FCC net neutrality regulations. (FCC; *Restoring Internet Freedom*, 83 Fed. Reg. 7,852 (Feb. 22, 2018)). A portion of the repeals was effective April 23, 2018 (83 Fed. Reg. 7,852), and a portion of the repeal is to be effective on June 11, 2018 (FCC; *Restoring Internet Freedom*, 83 Fed. Reg. 21,927 (May 11, 2018)).

On Feb. 27, 2018, S.J.Res.52, *A joint resolution providing for congressional disapproval under chapter 8 of title 5, United States Code, of the rule submitted by the Federal Communications Commission relating to "Restoring Internet Freedom"* was introduced in the Senate. This joint resolution, if passed, would repeal the FCC's *Restoring Internet Freedom* regulations and instead keep the 2015 net neutrality regulations in place. On May 16, 2018, the Senate voted to pass the joint resolution. If the House passes the resolution and the President signs it, the 2015 net neutrality regulations will remain in place.

All relevant votes, including votes of commissioners at the FCC to approve the 2015 rules and the 2018 repeal, have been along partisan lines with Democrats voting in support of net neutrality and Republicans generally voting to repeal net neutrality.

LIBRARY METRICS

Connecting Metrics to the Big Picture

Emily Dust Nimsakont
University of Nebraska-Lincoln

When collecting metrics about library usage, it is very easy to get caught up in the small details of the statistics themselves. When this happens, it is possible to arrive at a place where you are collecting statistics simply for the sake of collecting statistics. Sometimes it is useful to take a step back and make sure that you are actually measuring things that make a difference for your library. One way to do that is to look at what metrics can be used to measure how the library is engaging with its larger organization, whether that is a law school, a law firm, or any other environment.

In an article entitled "Using library search service metrics to demonstrate library value and manage workload," Laurissa B. Gann and Greg F. Pratt from the Research Medical Library (RML) at the University of Texas MD Anderson Cancer Center wrote about their experiences with assigning an "information use" value to the reference metrics they record (Gann and Pratt 2013). Librarians at the medical library had already been recording the topics of literature searches they were asked to do, but in 2010, they "decided to also record intended use of information requested" (p. 228). According to the article, the librarians "believed this information use metric would help the expert search service better manage a demanding workload and hoped it would help the RML discover and relate how its search services impact institutional activities" (p. 228). In order to provide some level of standardization in this "information use" metric, the search team identified possible categories for which information could be used, ending up with 21 categories.

For RML, the effect of collecting statistics on information use is that the library "is able to show its contributions to faculty research, publication productivity, development of educational classes and presentations, and overall contribution to the publication impact of the institution" (p. 229). The RML search team found that by simply adding this one piece of information to statistics they were already collecting, they were able to more effectively tie their work into the overall goals of their institution.

Gann and Pratt showed how making a small addition to the statistics kept about the library's day-to-day interactions can help make a case about the library's engagement with the goals of its larger organization. In another study, Craig Gibson and Christopher Dixon of George Mason University Libraries took a somewhat more top-down approach and studied the ways in which academic libraries make efforts to use metrics to measure library engagement (Gibson and Dixon, 2011). These librarians' definition of engagement is based on "the Boyer 'Scholarship of Engagement' construct, which sees higher education institutions, and their members, developing a 'public scholarship' which unifies research, teaching, and service in creating connections with a broader set of issues, concerns, and agendas beyond their institutions" (p. 341).

Gibson and Dixon interviewed librarians from ten academic libraries to determine their concerns about engagement in their university communities. As a result of these interviews, when it comes to measuring engagement, Gibson and Dixon suggest focusing on metrics in these five broad categories, giving examples of both qualitative and quantitative measures that can be used to measure engagement:

1. **Mission and strategy.** Metrics in this group include "engagement embedded in mission and vision statements" and "extent of involvement in stakeholder planning meetings across campus units."
2. **Role definition and positioning.** Metrics that fall into this category include "degree of library participation in teaching, research, and service processes of the institution" and "contributions to core strategic, institutional-level goals."
3. **Management and resource allocation.** Examples of metrics in this category are "flexibility and adaptation skills of library staff" and "externally-focused workload of staff."

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4. **Program effectiveness.** Metrics in this category include “quality of relationships with project partners” and “satisfaction of clientele.”
 5. **Outcomes and impact.** Examples of metrics in this group are “enabling new knowledge and products to be developed by constituent communities” and “collaborative projects or ventures completed” (p. 346).

Clearly, the particular metrics used for each institution can be more specific than the ones listed here and can be based on particular external-facing projects in which a library is engaged. However, the framework provided by this study is useful in that it can provide a place to begin thinking about the type of engagement metrics that might work for a particular library.

As these two examples show, it is important to think about using metrics to show how a library’s work fits into the goals of its larger institution. I think there are lessons here to be learned for both academic law libraries and firm libraries. Tying your library’s work to the mission and goals of your institution and keeping track of metrics that relate to those goals can help those outside the library understand the library’s value to the institution.

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MANAGEMENT

Don’t be a Dementor

Beth Farrell
Cleveland-Marshall College of Law Library

In the Harry Potter universe, the soul-sucking Dementors are among the most feared creatures. According to the sadly short-lived Defense Against the Dark Arts Professor Remus Lupin, Dementors “...glory in decay and despair, they drain peace, hope, and happiness out of the air around them...”¹ Perhaps, just like...a bad supervisor at work?

Dan Cable, London Business School organizational behavior professor, says that while most managers do not wake up in the morning thinking about how to best drain the souls of their employees, surveys consistently show that a great majority of workers feel disengaged at work.² He opens his new book, *Alive at Work: The Neuroscience of Helping Your People Love What They Do*, with this fitting bit of graffiti he spotted in London “I wonder what my soul does all day when I’m at work.”

Cable reports that a survey of 1.7 million workers in 101 companies across 63 counties showed that about 80% of workers are not engaged at their jobs, seeing their workweek as nothing more than “a commute to the weekend.”³ Helping employees become more engaged at work is not a motivational problem, Cable argues, but rather a biological one.⁴ A bureaucratic organization—chock-full of rigid policies, strict departmentalization of duties, and controls on resources—can power down a person’s “seeking system,” the dopamine-fueled, ventral tegmental area (VTA) of the brain that encourages, among other things, exploration, investigation, interest, and expectancy.⁵

Massive overhaul of an organization is not needed to help employees become more engaged at work, according to Cable; small, consequential nudges from leaders can do the trick.⁶ Being mindful of employees’ seeking systems will help us create work environments in which employees feel free to experiment with their personal interests and strengths—within the frame of our organization’s mission and demands.⁷

Cable’s suggestions include:

Take an hour or so to just chat with new hires before launching into job training. Ask them to tell you about a specific time—perhaps at work, perhaps not—when they felt they were performing at their best. Ask them to describe their unique qualities. Not only will this help you get to know them and be better able to introduce them around the office, they will feel recognized as individuals. Cable’s research showed that employees whose onboarding sessions included this kind of individual recognition were both more satisfied with their jobs and better performers than those employees who went through traditional onboarding.⁸ As I read this, I thought particularly about student workers within the library—considering their short tenure and often-tedious job duties, helping them feel valued as individuals as soon as they come onboard could make a difference in their overall job satisfaction and performance.

Help employees experience the impact of their work. Our seeking systems are ignited when we experience purpose in our work, according to Cable, but purpose is not something leaders can just present to employees on a platter.⁹ Instead, leaders should create genuine “purpose experiences” to help employees witness their impact on others and develop their own stories about the “why” of their work; powerful examples included taking workers from a tire factory to an ice track to watch how well their snow tires performed and having a diabetic patient speak to a medical device team about how the blood glucose monitor they had designed truly improved her quality of life.¹⁰ For some technical services staff members, interacting with students, alumni, or professors can help them find the “why of their work.” Others might prefer seeing usage statistics of the online resources they catalog every day or how their excellent management of the serials expenditures helps to keep the law school budget balanced.

Strive to be a “humble leader.” Research has shown that when leaders express feelings of uncertainty, admit mistakes, and share their own developmental journeys, employees are also inspired to develop “learning mindsets” in which they feel safe to explore, fail, and practice in order to learn and improve.¹¹ As part of the dreaded annual performance review, just asking staff how you can help them do their job better (and then genuinely trying to do that!) helps break the stifling top-down, bureaucratic leadership which ramps up people’s fear systems and stifles the drive to experiment and learn.¹²

Helping our employees retain their souls at work and find meaning, even happiness, in the place where we spend most of our waking hours certainly seems a worthy end in itself, but Cable persuasively argues that it will help us better our organizations as well.

Endnotes

¹ J.K. Rowling. *Harry Potter and the Prisoner of Azkaban* (New York: Scholastic, 1999), 187.

² Sarah Green Carmichael. “Make Work Engaging Again” *HBR Ideacast*. Podcast audio, April 3, 2018. <https://hbr.org/ideacast/2018/04/make-work-engaging-again.html>.

³ Emily Buchanan. “Alive at Work” *London Business School Review*. Podcast audio, March 15, 2018. <https://www.london.edu/faculty-and-research/lbsr/alive-at-work>.

⁴ Dan Cable. *Alive at Work*. (Boston: Harvard Business Review Press), introduction, Kindle.

⁵ Karen Badt. *Depressed? Your “Seeking System” Might Not Be Working*, HuffPost, July 18, 2013 at https://www.huffingtonpost.com/karin-badt/depressed-your-seeking-sy_b_3616967.html.

⁶ Cable, *Alive at Work*, introduction.

⁷ Cable, *Alive at Work*, chap. 6.

⁸ Cable, *Alive at Work*, chap. 7.

⁹ Cable, *Alive at Work*, chap. 8.

¹⁰ *Ibid.*

¹¹ Cable, *Alive at Work*, chap. 7.

¹² *Ibid.*

OCLC Update at AALL2018

OCLC

Emily Dust Nimsakont
University of Nebraska-Lincoln

Don’t forget to attend the OCLC Update at AALL2018! Eric Childress will provide an update of happenings at OCLC. We will be meeting at 7:30AM on Monday, July 16, in the Hilton Holiday Ballroom 3 for Eric’s update.

Since the update is early in the morning, we are planning to have some morning beverages and bakery items to help tide everyone over until the Exhibit Hall Breakfast Break.

If you have questions you would like Eric to address during the update, send them to me ahead of time (at emily.dust.nimsakont@unl.edu), and I will pass them on to him prior to the July meeting.

Thanks, and I hope to see you all in Baltimore.

The Archive Station

*Matthew Jenks
University of New Hampshire*

It is that time of year again. While the rest of the law school takes a breather, we archivists take a deep breath. Tasks or projects deemed too time-consuming or otherwise not appropriate to tackle during the school year suddenly come to the fore and leap to the top of our to-do lists. This is the archivists' Prime Time. While cleaning, disinfecting, organizing, accessioning, arranging (or rearranging), accepting new materials (or not), reviewing policies, and generally sprucing the place up are the necessary tasks of archival maintenance, there are also the initiatives—those long-term, involved projects and enterprises, frequently collaborative, which can be transformative and groundbreaking for the archives. If maintenance is the meat-and-potatoes of the archives, these initiatives are the dessert—but they are no less necessary for an archive to survive and even prosper. At their best, they inject a new vitality—even a creative spark—into your collections and the perception of those collections by the greater law school and the “outside world.”

With this in mind, one of the initiatives we are currently implementing at the University of New Hampshire (UNH) Law is a timely one that may work well for your law library and archives. It arose from an idea inspired by one of our law students. The student, Doug, will be spending this summer assisting us in our archives with all sorts of things—accessioning, arranging, describing, photography—even digitization if we get around to it. He is passionate about history, and he is the type of young advocate archivists pray for constantly.

In addition to this, Doug will be the student coordinator for tours over the summer. This means he will take the lead in arranging tours of the school and the library by prospective students (and their parents) considering UNH Law for the fall. Doug approached me a few months ago about wanting to write up a brief (and hopefully engaging) school history to narrate during his tour of the library, and he asked me if I could provide him with a synopsis and some talking points he could work around. I enthusiastically agreed to this, and then he wondered aloud if there would be a way to also incorporate some photos and documents from the archives into his tours—to “bring history alive,” as it were. Perhaps some ephemeral items could be set aside in a certain area along the route.

That is when an idea occurred to me: what if we created a dedicated area for just this purpose? What if we could create an Archive Station, as it were—either a display case, a table, an exhibit board, or even a digital frame. This dedicated space could be not only a staging ground for an engaging and fun archival tableaux and history of the law school; it could also serve as a promotional tool for the school, featuring snapshots in time of all the seminal events and iconic passages which represent the pinnacle moments in the school's life and history. In addition, we did not have to stop there.

The Archive Station could have a revolving lineup, a changing and flexible layout. This layout, which can be as diverse and unique as we like, would correspond to whatever current “season” or month we were currently in. For us at the UNH School of Law, summer might include Intellectual Property Summer Institute materials (IPSI), PIC (Public Interest Coalition) auction photos, ice cream social photos, and Buck Bowl and Jive documents, photos and materials. This was a layout which could be as wide open as we wanted, or we could go with a simple 3-dimensional, left-to-right chronological history, with space in each section for changing out photos and documents on a regular basis so as to keep things fresh.

After meeting with our Director, who gave the idea a thumbs-up, we decided to go with setting up a wall display along the tour route, in the short hallway near the entrance to the library. We may also decide to incorporate a table display underneath, with two smaller standing digital frames we can use to display a constant montage of alternating historical photos. On the wall and the table itself, we will feature key documents and photos pertaining to the school's history at different periods. Key areas to draw from will be founding documents, 1970s, 1980s, 1990s, 2000s, 2010s, graduations, intellectual property-related items, social justice-related items, miscellaneous events, publications (occasionally), and faculty, staff, and seminal events in the school's history. This is, of course, a lot to draw from, and if your school is 100-200 years old (or more), the task will be even more daunting. However, if you want to take on this sort of initiative for your law school, the key here is not to be constrained by the assumption that you HAVE to include items from every category you have created in your exhibit. They are merely your paints, and the exhibit is your canvas. You can choose any colors you like. You have the control and the autonomy, so if during one month (or week), you decide to feature an entire display of only graduations (May is a good time for this), then that is your decision, and no one will ever chide you for leaving out the date the cornerstone was laid or the year you merged with the university. The only rule I would suggest keeping is one of cohesiveness. Each temporary

display or exhibit should be cohesive unto itself. Otherwise, the options are endless. We even have ideas for various alumni displays during alumni week so visiting alumni can view photomontages and try to identify who's who (and themselves) in the pictures. During the week of Halloween in the late fall, we will feature a "spooky" historical display, detailing accounts of some of the creepier goings-on in the history of our law school (and the building that was here previously—the Durgin Silver Factory). To sum it all up, the only limitation to your options is your imagination. Make it creative, and make it fun!

Here are some things to keep in mind (mostly for newer archivists like myself):

1. Of course, always use copies of documents, photos, and other "Information Objects."
2. Set up the display in a location that sees library traffic . . .
3. But does not get in the way of things.
4. Always run exhibit ideas by your Manager or Director first.
5. Engage students and patrons using your exhibit. Give them something to ponder. One of the features in our exhibit will be to send students on a scavenger hunt of sorts (if they so desire). I have not come up with the entire quiz questions yet, but a good way to generate questions is to connect archive-related items to locations within the school. An example: Find the location in the school that contains the only remaining brick walls of the original Durgin Silver Factory (due to the striking difference in the bricks, this is not as hard as it sounds).
6. Keep an ongoing library of copies of documents, photos, and other archival treasures to use for your displays. This makes it easier to plan your exhibits and saves extra work in the future. In addition, the digital photos you have stored in your online library (for printing copies) will go a long way toward helping to facilitate a digitization project, should you decide to do that in the future.

This initiative (and others like it) will pay off in ways both expected and unexpected. It will ensure the archive's importance and place in the hierarchy of the school and enable it to gain in both visibility and status. This is all about connecting the archives to the greater institution, and by doing this, we connect the current incarnation of the law school to its own history and sense of identity. Happy Archiving!

Technical Services Special Interest Section 2018 Silent Auction Begins

It is time to submit information about items you wish to donate for the 2018 Technical Services Special Interest Section (TS-SIS) Silent Auction to support the Marla Schwartz Grant. This year's auction will begin as a "virtual" auction with online bidding starting June 11 and ending July 6. The auction will continue "Live" on Sunday, July 15, at 5:15 p.m. during the TS-SIS Meet & Greet/Awards Presentation at the AALL Annual Meeting in Baltimore.

To get your donated items posted online for bidding, send a separate email message for each item to emily.dust.nimsakont@unl.edu. Include the following in your message:

- picture of item
- brief description
- value of item
- opening bid

Donors bring the listed items to the TS-SIS Meet & Greet where final bidding takes place. After the meeting, winners pay for and collect their articles. In addition, there is an "online only" option. If you prefer to designate your items as online only, let me know. This will allow those unable to attend the meeting in Baltimore to participate.

Additional information is available at the TS-SIS Marla Schwartz Silent Auction website at <https://tssisauction2018.wordpress.com/>.

If you have questions, please feel free to contact me via email, emily.dust.nimsakont@unl.edu, or by phone at 402-472-1944.

*Emily Dust Nimsakont
University of Nebraska-Lincoln*

Looking for a Few Good Applicants

*JoAnn Hounshell
Sidley Austin LLP*

Recently, our library posted a position for a Collections Coordinator in Technical Services. You may get the impression from the position title that we are looking for someone to repossess library materials from our clients. In truth, we are looking for a library assistant that can help wrangle our serials collections in various locations and in a variety of formats. Although I have been a hiring manager in other libraries, this is my first experience in hiring at a law firm library. I am finding that my idea of the successful candidate has slightly changed.

In writing any job description, I get hung up with experience versus education. Does having an undergraduate degree in English mean more than 8 years experience in working with sources of legal information? The argument is that a degree only proves academic success and not necessarily real-work success. My opinion about experience versus education has changed since I left academia. More and more, I am looking for applicants with real-work experience in all position levels, which causes some consternation within the HR department. It all comes down to what a supervisor wants to take the time to train a new employee on. For me, it comes down to what I can train someone to do versus what I cannot train them to do.

I look closely for the soft skills of an applicant because these are skills that are less trainable. The difficulty is that these skills are much harder to quantify, especially in a technical services position. The soft skills that I most commonly look for now are a commitment to customer service, the ability to listen and ask the “right” questions, tolerance with changing priorities, and sensitivity towards colleagues that are also challenged by changing priorities. Again, these skills are harder to identify or measure during the application review and interview. These are the skills that are not trainable.

Should the type of library an applicant worked in have a weighted value? When I first entered the law library universe, the standard rule was there was little cross-pollination in hiring between academic law libraries and firm libraries. We are now seeing the rule broken, if not totally abolished. All libraries are looking for candidates that have strong organizational skills, strong attention to detail, strong interpersonal communication skills, and the ability to work in a team environment, preserve confidentiality, work under pressure, and juggle multiple projects with competing deadlines. The main differences I see in working in a firm library’s technical services department, as opposed to an academic library’s technical services department, are the sense of urgency in any project and the ability to work under the pressure of serious deadlines.

RESEARCH & PUBLICATIONS

Tips for Making Sure Assessments and Research are Done Well

*Hollie White
Curtin University*

When it comes to library assessment and research, sometimes it can be hard to determine if the correct processes and procedures are being performed for the questions being asked. No one wants to put a lot of time and energy into an assessment only to be told that they were doing the wrong thing. Just like having writing proofread or someone else check calculations, assessment and research processes have a few generally known approaches that help new (and experienced) researchers know they are doing research correctly.

Use methods that others have used and proven before

If doing assessment or research for the first time, then borrow or take inspiration from a study done somewhere else. Inspiration for potential assessments can come from: colleagues in Technical Services Special Interest Section (TS-SIS) or the American Association of Law Libraries (AALL) in general; contacts at your main library (if in an academic library setting); or library information system (LIS) or other subject literature. It may seem boring to just do something that someone has done, but it can be reassuring to have someone else to consult or refer to when going through assessment for the first time. Also, using a pre-existing and proven method/approach allows for the potential of comparative results.

Have someone else (and not your direct reports) check your work

Just as someone would share a piece of writing or some calculations with a colleague before submitting it for final approval, there are a few ways to get feedback about data collection and processes. Giving someone a list or paragraph of methods and asking generally for opinions may not get the type of feedback desired. Usually, other librarians (and especially direct reports) will just say supporting things about methods/assessment techniques. Instead, get assistance about specific parts of the research process. One example of this is inter-coder reliability. If you are gathering data about a certain topic and using categorical codes to record information, you have created codes/categories that mean certain things about your research. To make sure that the codes created and applied make sense, share a sample of your data with a trusted colleague and ask them to code the data based on the same guidelines. The results of each coding session are compared to see what percentage of coding is the same and what percentage is different. This comparison also shows if there are mistakes in the coding or if certain assumptions that are not universal are present. Inter-coder reliability is one of the processes that helps improve data quality. Another example is survey work. All surveys should undergo a pre-test. During that pre-test, the way questions are phrased and the ease of taking the survey should be examined...not the results of the questions. Colleagues can give really nice usability feedback even if they are not subject specialists related to the survey content. These small gestures of incorporating other's feedback improve research quality greatly. Both of these activities, inter-coder reliability and pre-tests, would be reported on when sharing final results.

Share, Share, Share, and Share Some More

Sharing is an important part of knowing that research is being performed well. Sharing can happen in person—in work meetings, in committee meetings, or at conference presentations, or through writing—on discussion boards or through publication (like *Technical Services Law Librarian* or even *Law Library Journal*). Yet, sharing can be scary because it can open you up to criticism. Working in a law-related field in particular means everyone wants to argue their points of view. Even if you follow all these suggestions, there may be times when people will question why you did something in a certain way instead of another. If that happens to you, it is all right. Research and assessment is a discussion and a learning process. Criticism is just one part of the process. When criticism or alternative suggestions are being presented, it is important to listen to what others have to say and then evaluate later whether what was expressed is something that needs to be incorporated into the research or not. It is perfectly acceptable to disagree on methods calmly and respectfully, but it is not acceptable to dismiss, belittle, or attack someone because they disagree with you. Despite these anxieties, making assessment and research a normal part of everyday practice can be a rewarding experience.

Sharing research methods, assessment approaches, and results from library-based studies are all a part of being a researcher. Hopefully, these tips will inspire others to find assessment projects to undertake that can benefit technical services law librarianship. The key take away is that research is a social process. Library assessment is not done in isolation. The image of the lone researcher scribbling away in an office, cut off from the world, is not reality. Assessment and research are about community, sharing, and learning in order to better services in libraries for library users.



SERIALS ISSUES

Rebecca Ensberg
Smith, Gambrell & Russell LLP

Greetings! Let me share with you a few details. First, I am very happy to be the newest columnist for “Serials Issues.” Second, I am relatively new (six months) to firm librarianship. However, I have been in the profession a long time, graduating from library school in the previous century! While I came to librarianship as a third career (best decision ever), I began my library career in an academic law library. After many years there, I worked in a non-law academic library for many more years. Now, however, I am back in law librarianship—and loving it! Things have changed A LOT in the 10 years since I worked in an academic law library. In my current position as a Reference/Technical Services Librarian at a law firm, there's never a dull moment. As one of only two librarians here (the other librarian is the Library Director), we do it all. Although I handle occasional reference issues, I typically focus on technical services issues, primarily serials issues.

It is important to note that—like many of my colleagues who work with serials—I am **not** an electronic resources librarian. I **am** a technical service librarian. Many larger academic and public law libraries are quite fortunate to have electronic resources librarians. However, many firm libraries—even large firms—do not, just like many academic and public law libraries.

Consequently, it seems that in today's law library environment where many print resources will soon become—or have already become—digital only (in particular online only), to be effective, a technical services librarian now needs to be conversant in the area of electronic resources management that relates to a traditional serials issue—the daily workflow of the check in process.

The announcement this spring by Bloomberg BNA that it will discontinue its print service inspired my preceding statement. We subscribe to many Bloomberg BNA newsletters that arrive weekly, biweekly, or monthly. That represents a lot of checking in of issues. But when that print service becomes a web-based service—ostensibly to be completed by the end of the summer—there will undoubtedly be many changes to our check in process.

To better understand—and then develop processes for—this emerging situation, we need to ask questions:

- What does this mean for us as professionals as we process materials (or web-based resources) ‘behind the scene?’
- More specifically, how do we modify the traditional check in process for a new web-based reality?
 - **Can** we modify it?
 - Or do we need to do something different?

If, as Pace states in his 2015 article, “Closing the Gap,” “the only discernible purpose of serials check in [is] to determine what has *not* been checked in,” does the whole idea of checking in formerly print materials that are now almost instantly available online make the concept of ‘checking in’ moot?

Another resource that I came across in preparing to write this column is from the Association for Library Collections & Technical Services (ALCTS) website, entitled “Syllabus for Managing Print and Electronic Serials,” at <http://www.ala.org/alcts/resources/collect/serials/sermgtpe>. To navigate there, go to ALCTS News, Collections, and Continuing Resources.

What are your comments? I will incorporate them into the next “Serials Issues” column. In addition, if you are able to attend the American Association of Law Libraries (AALL) 2018 Annual Meeting in Baltimore this July, with the theme of “From Knowledge to Action,” you may gain further insight into this serials issue. If so, please share your thoughts. I would love to hear from you—email me at rengsberg@sgrlaw.com.

Endnotes

Pace, Andrew K. “Closing the Gap.” *Serials Review* 41, no. 1 (2015): 3-7.



SERIALS TITLES

Crystal Alberthal
University of Washington

The serials staff of the University of Washington School of Law, Gallagher Law Library recently identified the following serial title changes:

No titles identified.

The serials staff of the University of Washington School of Law, Gallagher Law Library recently identified the following serial cessations:

Journal of law, philosophy and culture
Ceased with: v.6 (2011)
(OCoLC 168379514)

Law and business review of the Americas
Ceased with: v.22 (2016)
(OCoLC 52343644)



SUBJECT HEADINGS

Patrick Lavey
UCLA

A brief look at Congress.gov reveals no movement on forcing the headings *Aliens* and *Illegal aliens* on the Library of Congress (LC), so this column will focus on the mundane tasks that keep us busy. *Social security* continues to be used in place of *Social rights* in some cases, presumably by non-law catalogers. I hope that if we turn to retrospective conversion, we will watch for this and make necessary changes to bibliographic records.

A number of new headings have appeared and are worthy of note. Most interestingly, LC approved the heading *Right to democracy* and its classification number K3252.7. Its broader term is *Human rights*, and it has obvious implications for international law. A less appealing heading related to human rights is *Flaying (Torture)*, obviously a human rights violation. *Threats in language* may be used and will be an interesting topic to follow in general reading.

Turning to the Greek economy, the heading *Greece—Economic conditions—1974-* has been changed to *Greece—Economic conditions—1974-2009*, and the heading *Greece—Economic conditions—2009-* added. Its related heading, *Greece—Economic policy* for these years has also changed. A related heading, lately, to the Greek economy, *Crises in mass media*, is available. In addition, *Reputation (Greek law)* has appeared. In nearby Egypt, *Egypt—History—Coup d'état, 2013* may be used. The term *Peacekeeping forces (International law)* appeared, as did *Reaper (Drone aircraft)*.

LC approved several headings related to criminal law. *Mediation and conciliation, Criminal* is an interesting subject, as is *Child trafficking—Investigation*. In addition, LC added a few headings pertaining to forensic science. *Buccal swabs* (for cheek swabs) and *Epithelial cells—Collection and preservation* appeared and, of course, have application outside forensic science. *Digital forensic science* is available and has a scope note which merits consultation. *Alcohol trafficking* has appeared, in place of the Depression Era terms “bootlegging” and “Rumrunning.” Read the subject heading carefully, especially the scope note and the cataloger’s note.

Veering back to genetics, approved new terms include *CRISPR (Genetics)* and *Gene editing*, and they merit reading. An added health related term is *Hypnobirthing*, and it has an informative 670 note. The public health related term *Water—Distribution—Automation* has appeared. Speaking of automation, newly approved terms include *Computer bootstrapping* and *Basic input-output systems* (used for BIOS). *Plug-in electric vehicles* and *Automobiles—Motors—Mounts* have appeared. (Problems with this part of your car are unpleasant and expensive to fix, as I learned after receiving a “free” hand-me-down car from my mother.)

Terms pertaining to the LGBT community continue to appear. Approved headings include *Social work with gender-nonconforming youth*, *Transgender college teachers*, and *Lesbian soccer players*, as was *Transgender Day of Remembrance*.

A final miscellaneous items paragraph includes the change from *Justice, Administration of—Sources* to *Justice, Administration of—History—Sources*. Use *Peer-to-peer loans* instead of “Social lending.” *Commercial buildings—Russia (Federation)*, *Hispanic American mayors*, and *Windborne debris* were added. No law-related genre/form terms appeared, but *Ethnographies*, *Local histories*, and *Political comics* may be used.



Contributing authors: Caitlyn Lam, Jason LeMay, Jackie Magagnosc, Lauren Seney, Travis Spence

Acquisitions

Project COUNTER publishes librarian’s guide to COUNTER release 5

COUNTER release 5 is scheduled to replace COUNTER release 4 by January 2019 (<https://www.projectcounter.org/wp-content/uploads/2017/07/transition-timeline-005-1.pdf>). In preparation for this change, Project COUNTER has issued *The friendly guide to release 5 for librarians* (https://www.projectcounter.org/wp-content/uploads/2018/03/Release5_Librarians_PDFX_20180307.pdf).

COUNTER release 5 represents a revision of the COUNTER code of practice to better reflect changing reporting needs. Types of reports have been simplified to both assist providers in becoming COUNTER compliant and provide librarians with “usage statistics that are credible, consistent and comparable.” Page 19 of the guide provides a table comparing Release 5 reports with covered Release 4 reports. Several sample usage scenarios are provided.

The COUNTER code of practice provides consistent guidelines for publishers reporting electronic resource usage, assisting librarians in evaluation of their usage.

Cataloging

Using the Google Translate App to Assist in Cataloging: A Brief Case Study

As Technical Services staff sizes have shrunk over the past several years, so has in-house expertise with foreign languages. While our library collects materials mainly in English, with some Spanish, we do still get the occasional item in a language no one in the library speaks or reads.

This happened recently when we were given a gift copy of a book from a Japanese publisher. An accompanying letter, written in English, said that the book contained a reprint of an article by one of our faculty members. The letter mentioned the name of the faculty member but did not indicate which chapter was his. The book itself was completely in Japanese, so our cataloger had no way of knowing which chapter in the book was the reprint. We needed to know so that we could include that information in our catalog record for the book as well as update our internal database of faculty publications.

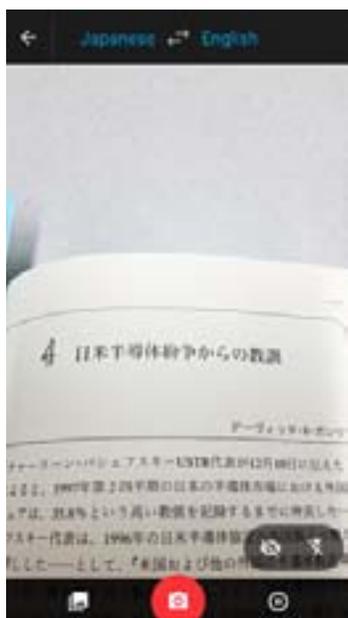


image 1



image 2

We were able to find a bib record for the book in OCLC with an ISBN search, but it did not contain a content note. After searching in vain in various places for a record that had a detailed content note, I remembered the Google Translate app on my phone. After opening the app and telling it I need to translate from Japanese to English, I took a picture of the chapter titles [image 1].

The app scanned the photo, looking for Japanese text. I was then given the option to select the text to translate or translate the entire page. Since I was looking for chapter titles and authors, I just selected those [image 2].

A preview of the translation was displayed at the top of the screen. I could tap through to see the full translation. When I saw the faculty member’s name, I knew that I had found his chapter [image 3].



image 3

While the translation was not 100% perfect (the word “the” was missing from the title and the faculty member’s name was misspelled), it was more than enough for us to recognize that we had located the reprint.

Google Translate allows for the downloading of translation files in all its supported languages. With downloaded translation files, the user can perform translations while offline. It also enables instant translations that show the translated text in situ, in real time.

In my experience, even though the instant translation is super cool to look at, it is not completely accurate, especially when translating languages that do not use the Roman alphabet. As shown above, the title is not accurate, nor is the author’s name. However, instant translation will cycle through various possible translations.

The Google Translate app, while not perfect, can at least point catalogers in the right direction when they are tasked with cataloging materials in languages they do not know. It also has many other features that we have not begun to explore, such as text to speech, verbal translation, and the option to hand write text on the screen to translate.

Our cataloger is eager to try the app on a few Russian language books that have been sitting on her desk for a while. The app is certainly faster than tracking down a speaker of the language or trying to enter text in Google’s web-based translation service.

Government Documents

Revisions to Legal Requirements and Program Regulations (LRPR)

The current guide for Federal Depository Library Program (FDLP) libraries was designed to be an easier to use consolidation of the various rules and regulations as they relate to depository library requirements. Issued in 2011, the *Legal Requirements and Program Regulations of the Federal Depository Library Program* (or LRPR) has been showing its age. However, with changes to Title 44 on the horizon (see <https://www.fdlp.gov/about-fdlp/23-projects/3353-title-44-revision> for more information), there has been reluctance to completely rewrite this guide.

Because of this, I was a little surprised to see an email from the “FDLP Webmaster” announcing a revised edition of LRPR. The changes in this 2018 revision are minor, to be sure. They boil down to:

- Rescindment of regulation 10 (tangible item selection requirement)
- Updated FDLP email list information
- Inclusion of regional discard policy
- References to new FDLP decals

None of these changes are groundbreaking, but it always helps to have the most current information at hand when dealing with FDLP requirements. Get the latest edition at <https://www.fdlp.gov/requirements-guidance/legal-requirements>.

Information technology

RA21 - Resource Access for the 21st Century

A recent series of posts in The Scholarly Kitchen (<https://scholarlykitchen.sspnet.org/>) discussed the pros and cons of RA 21: Resource Access for the 21st Century (<https://ra21.org/>). What is RA 21, and how does it relate to more familiar means of authentication?

The current norm for authentication used by academic institutions is Internet Protocol (IP) authentication. If a researcher originates within the IP range associated with an institution, s/he is presumed to be associated with that institution and entitled to resources provided by that institution. For a non-technical explanation of how IP (and other authentication methods) work, see *Understanding federated identity, RA21 and other authentication methods* (<http://musingsaboutlibrarianship.blogspot.com/2017/12/understanding-federated-identity-ra21.html>).

RA21 is a joint NISO/STM (National Information Standards Organization/International Association of Scientific, Technical and Medical Publishers) initiative “aimed at optimizing protocols across key stakeholder groups, with a goal of facilitating a seamless user experience for consumers of scientific communication” (<https://ra21.org/index.php/what-is-ra21/>). The

basic assumption of this initiative is that IP range based authentication no longer works for users of scholarly information. In place of IP authentication and proxy servers, use of a federated authentication model is proposed.

Hinchliffe and Schonfeld express concerns about patron privacy, which may be ameliorated by requirements of the EU General Data Protection Regulation (GDPR) (<https://www.eugdpr.org/>) scheduled for enforcement beginning in May 2018. Given some publisher's attempts to cover all aspects of scholarly work flow, would they be inclined to mine and monetize the information about a scholar's research patterns federated identity could generate? Additionally, access for walk-in users may also be an issue.

RA21 is hardly a done deal, but it certainly bears monitoring.

Hinchliffe, Lisa Janicke *What will you do when they come for your proxy server?*

<https://scholarlykitchen.sspnet.org/2018/01/16/what-will-you-do-when-they-come-for-your-proxy-server-ra21>

Schonfeld, Roger C. *Identity is everything*

<https://scholarlykitchen.sspnet.org/2018/01/22/identity-everything/>

Carpenter, Todd A. *Myth busting: five commonly held misconceptions about RA21 (and one rumor confirmed)* <https://scholarlykitchen.sspnet.org/2018/02/07/myth-busting-five-commonly-held-misconceptions-ra21/>

Preservation

Digital Scholarship Guide

One of the projects the Labs team (<https://labs.loc.gov/>) at the Library of Congress worked on in 2017 was developing a guide for digital resources. The guide was rolled out in seven posts this year on *The Signal* (<https://blogs.loc.gov/thesignal>), but is now conveniently available as a single document, the Digital Scholarship Resource Guide (<https://labs.loc.gov/portals/static/labs/meta/images/SHerron-Digital-Scholarship-Resource-Guide.pdf?loclr=blogsig>).

This document is a fairly comprehensive look at what digital scholarship is and how to get a project off the ground, from digitization basics to file storage and preservation to document analysis and assigning metadata to analysis projects with digital data.

If you would prefer the original posts, here they are:

- Part 1: Why Digital Materials Matter (below the image): <https://blogs.loc.gov/thesignal/2018/01/new-year-new-you-a-digital-scholarship-guide-in-seven-parts/>
- Part 2: Making Digital Resources: <https://blogs.loc.gov/thesignal/2018/01/digital-scholarship-resource-guide-making-digital-resources-part-2-of-7/>
- Part 3: So now you have digital data... : <https://blogs.loc.gov/thesignal/2018/01/digital-scholarship-resource-guide-so-now-you-have-digital-data-part-3-of-7/>
- Part 4: Text Analysis: <https://blogs.loc.gov/thesignal/2018/01/digital-scholarship-resource-guide-text-analysis-part-4-of-7/>
- Part 5: Tools for Spatial Analysis: <https://blogs.loc.gov/thesignal/2018/02/digital-scholarship-resource-guide-tools-for-spatial-analysis-part-5-of-7/>
- Part 6: Network Analysis: <https://blogs.loc.gov/thesignal/2018/02/digital-scholarship-resource-guide-network-analysis-part-6-of-7/>
- Part 7: People, Blogs and Labs: <https://blogs.loc.gov/thesignal/2018/02/digital-scholarship-resource-guide-people-blogs-and-labs-part-7-of-7/>

Long-term Survival of PDF/A Files

PDF/A is widely marketed and regarded as a preservation file format. However, a recently published article, "PDF/A Considered Harmful for Digital Preservation" (<https://ipres2017.jp/wp-content/uploads/15.pdf>) by Marco Klindt serves as a prudent reminder that the PDF/A file format is not a comprehensive solution for preservation in itself.

For digital information to exist in the long term, the data that comprise the information content needs to remain discoverable, machine readable, and renderable for human consumption. If preserving digital content means that we are planning for the potential reuse of data, a computer needs to be able to read and extract this information in the future. However, there are significant challenges to preserving PDF files in the distinction between what the human eye can read and what a machine can interpret and extract.

PDF/A is intended to serve as the long-term archival version of PDF files. However, as the author notes, while PDF/A is marketed and widely adopted as a preservation format, “comprehensive policies regarding the use of PDF in archives seem to be rare,” and “using PDF/A as a container for files complicates preservation workflows and might be considered an additional risk.” PDF documents preserve the visual appearance, structure, and format of the original document, but this comes at a potential cost for the reusability of data. A PDF/A document created at Level A (accessible) conformance is designed to improve a document’s accessibility through the use of tagging to markup the structure and content of a document, which in turn should help support both visibility and reuse. However, in its current version, PDF/A-3 still presents multiple challenges.

Klindt discusses the risks and shortcomings through observations of existing inadequacies and challenges with the creation and reuse of PDF/A documents. The risks identified here undermine confidence in the suitability of PDF/A for long-term preservation. A few of the challenges discussed include impediments to text and content extraction in addition to information loss during the creation and conversion process. It is worth noting that while the author acknowledges the creation of veraPDF (an open-source PDF/A validator) addresses the PDF/A validation issues, he argues that validation is a “necessary condition,” but it does not mitigate risks to future reuse of content.

An understanding of these risks and shortcomings of PDF/A for preservation purposes underscores the need for comprehensive strategies and policies at the institutional level to safeguard digital content within a flawed archival solution. There are a number of useful, previously published resources on PDF/A cited in this article, including the National Digital Stewardship Alliance (NDSA) report on *The Benefits and Risks of the PDF/A-3 File Format for Archival Institutions* (http://www.digitalpreservation.gov/documents/NDSA_PDF_A3_report_final022014.pdf), and a National Information Standards Organization (NISO) *Information Standards Quarterly* article, “Preserving the Grey Literature Explosion: PDF/A and the Digital Archive” (https://www.niso.org/sites/default/files/stories/2017-08/IP_Moore_Evans_Grey_Lit_isqv25no3.pdf). The PDF/A-4 standard is expected to be published sometime in 2018.

Repository

2018 IIIF (International Image Interoperability Framework) Conference

Registration is currently open for the 2018 IIIF Conference (<http://iiif.io/event/2018/washington/>) held May 21-25 in Washington, DC. The IIIF Conference is co-hosted by the Library of Congress, the Smithsonian Institution, and the Folger Shakespeare Library, with an aim to advance the adoption of the IIIF framework.

IIIF (International Image Interoperability Framework) is a framework for publishing image-based resources in a way that enables images across repositories to be presented in IIIF-compatible image viewers (<http://iiif.io/apps-demos/#image-viewing-clients>). In particular, images can be “viewed, cited, annotated, and compared” side-by-side. In this example: [\\$78i](https://iiif.lib.harvard.edu/manifests/view/drs:42845955$70i;ext:aHR0cHM6Ly9paWlmLmFyY2hpdmVsYWUub3JnL2lpaWYvMzUxMDIwMTE3OTE5NTQvbWVuaWZlc3QuanNvbG==), you can view and compare digitized Litchfield Law School student notebooks from the Harvard Law Library collection and the Yale Law Library collection in a Mirador viewer. The Harvard collection of student notebooks is from Harvard’s Digital Repository Service, and the Yale collection is from the Internet Archive.

Pre-conference workshops will demo and showcase Mirador and Universal Viewer, two open-source applications that are gaining growing communities of adopters among libraries and museums.

Conference takeaways will focus on:

- How to adopt IIIF at your institution
- Leveraging open source software to get more out of your collection of images and video
- Use cases and best practices from IIIF adopters
- The latest developments in the community including IIIF A/V

FROG Summary

Sarah Lin
Reed Smith LLP

In May 2017, I received the joint Technical Services (TS) and Online Bibliographic Services (OBS) special interest sections' Funding Research Opportunities Grant (FROG) to look into the possibility of connecting Northern California Law Library Association (NOCALL) member library discards with Council of California County Law Libraries (CCCLL) member libraries who needed them. This idea came from former NOCALL President Ellen Platt's suggestion during the 2015 Spring Institute that if the county law library budgets were so limited, perhaps NOCALL members had books they didn't need that would fill those gaps. The hope was that deselected materials from NOCALL members would fill the acquisitions needs of the county law libraries, and that as a result, I would be able to work with the NOCALL web team to create a platform to handle the exchange of those materials.

Over the last year, I circulated surveys to NOCALL and CCCLL members, talked with county law librarians, and attended the advocacy-focused 2018 Spring Institute in order to examine the needs of the county law libraries and how discarded materials could fill those needs. For some time, our larger county law libraries, like San Francisco and Sacramento, have had various informal arrangements to pass superseded materials to smaller counties who needed them, and we thought that might prove tenable on a larger scale. I surveyed libraries for both what they needed and what they had available to gift. Unfortunately, the dominant answer was: "it depends" which materials would be available and which would be needed. That was not enough to justify the expenditure of time and resources to craft and maintain a website dedicated to materials exchange as I had envisioned. The current transfer of materials between large and small counties does not appear to be broken, and the availability of materials, plus their ability to get to another county, was largely dependent on what those future materials might be—and there is no way to predict what materials would be available and by whom and in which county. Additionally, attending the Spring Institute in March really drove home that out of date books will not help the funding crisis our county law libraries are in—the problem is much larger than their acquisitions budgets.

Although I examined this problem with an acquisitions lens, I learned a great deal about the plight of California county law libraries. In a nutshell, reduced legislative funding combined with a perfect storm of increased fee waivers and decreased filings (i.e. mandatory arbitration precluding the need to file) to decimate the county law library budgets across the state. The CCCLL lobbyist is working for a general line item before the Governor's desk as I write this in early May, and we are all hopeful that 2008 funding levels can be restored.

There are opportunities for NOCALL—both the organization and individual members—to make a tangible difference to CCCLL members. I made several suggestions in my recent NOCALL News column summarizing my grant work, and I hope that our membership will take time to think about how they would like to help and communicate that to the NOCALL Board. Out-of-date books are not the best solution to this problem, but it was helpful to gather the survey data to prove that what seemed like a good idea did not have the detailed need to support it.

I am very grateful for the support of TS and OBS to make this research possible, as well as to my employer, Reed Smith, for granting me the ~30 hours in which to do the work. I would encourage any member with more detailed questions about my grant work to reach out to me directly at slin@reedsmith.com.

Continued from page 1

Richard's service to AALL is highlighted by his extensive involvement with Annual Meetings. He has served on the Local Arrangement Committee for Annual Meetings in Portland and Seattle in 1994, 2008, and 2013, and he was a member of the Annual Meeting Program Committee for the 2005 Annual Meeting in San Antonio. He served on the Professional Development Committee from 2001 to 2003. With regard to AALL educational programs, Richard has been a coordinator, moderator, and speaker for many AALL Annual Meeting programs, on such topics as local systems, cataloging, discovery tools, and "Bridging the gulf and building understanding between technical services and public services managers."

Outside of AALL and TS-SIS, Richard has served the profession in so many ways at each stage of his career. When he was at the University of Denver Westminster Law Library and the University of Colorado Law Library throughout the 1980s, he was a member and leader within the Colorado Association of Law Libraries (COALL) and Southwestern Association Law Libraries (SWALL) chapters, including extensive committee work and service on the COALL board from 1987 to 1990.

When he moved to the University of Washington in 1992, he likewise became an active member of the Law Librarians of Puget Sound (LLOPS) chapter, where he was on the board from 2003 to 2006 and chaired its Membership and Nominations Committees, and of Innovative Law User Group (ILUG), which he also chaired in 1996-1997. He has been a prolific speaker, presenter, and panelist at programs and meetings for all of these organizations, among others.

Richard's scholarly publications include several articles in *AALL Spectrum*, such as "Request for Proposal: using an RFP to select the best technology system for your library," in March 2013, and *ABA Journal* will publish his forthcoming article on the skills and knowledge necessary for law librarians in today's legal climate. His book, *Selecting and Implementing an Integrated Library System: The Most Important Decision You Will Ever Make* was published by Chandos in 2015. He has taught courses on library systems at the University of Washington Information School since 2001 and has developed a new model for the law librarianship program, approved to start in the 2018-2019 academic year.

As Richard has transitioned from technical services and systems management into the directorship of one of the nation's most prestigious law librarianship programs, one colleague noted that "it speaks volumes about the importance of technical services perspective, attention to detail, and vision that he has led the program so ably."

In summary, Richard's long and varied career is in the best tradition of technical services law librarianship. He exemplifies leadership, service, mentorship, and extensive contributions to educational programming. The TS-SIS Awards Committee is pleased to recognize Richard M. Jost with this award.

Congratulations Richard!

2017-2018 TS-SIS Awards Committee

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Technical Services Law Librarian (ISSN 0195-4857) is an official publication of the Technical Services Special Interest Section and the Online Bibliographic Services Special Interest Section of the American Association of Law Libraries. It carries reports or summaries of AALL annual meeting events and other programs of OBS-SIS and TS-SIS, acts as the vehicle of communication for SIS committee activities, awards, and announcements, as well as current awareness and short implementation reports. It also publishes regular columns and special articles on a variety of topics related to technical services law librarianship.

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Publication Schedule

Issues are published quarterly in March, June, September, and December.

Deadlines (each vol/year):

no. 1 (September).....	August 21st
no. 2 (December)	November 21st
no. 3 (March)	February 21st
no. 4 (June).....	May 21st