Cataloging Microforms: It’s Not That Different from Cataloging Print Materials (Except When It Is)

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When cataloging microforms under RDA, LC-PCC PS for 1.11 is your friend. This policy statement explains that the Program for Cooperative Cataloging (Library of Congress) follows an interim approach to cataloging microform reproductions of print resources in the RDA environment. The general principle is to record descriptive elements for the print version and give details of the microform reproductions, both those cloned from print version records and records created originally (i.e., no print record exists or the cataloger chooses not to clone from the print record).

Provide all manifestation elements such as title, edition statement, publication statement, extent of the resource, etc., as they relate to the original print resource (if they are readily ascertainable); when cloning from a PCC record for the original print resource, these elements may remain as they are. Record elements that relate specifically to the microform reproduction as noted in the MARC 533 field section below. Information recorded in the 533 field may call for the addition of access points that relate only to the microform reproduction.

So, under LC-PCC PS 1.11, as under AACR2/LCRI, microfiche are treated as reproductions of the original print publications. Accordingly, the physical description field (300) reflects the print item. A reproduction note field (533) is added with information about the physical qualities of the microfiche, as it is considered a reproduction or copy of the original print version. In addition, current practice is to create a separate record for the microfiche format, with

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2020-2021 Officers, Committee Chairs, and Representatives

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Website Coordinator:
Marjah Sroczynski
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ALA MARC Advisory Committee (MAC)
Rachel Decker, Chapman University

ALA Committee on Cataloging: Description and Access (CC:DA)
Ryan Tamares, Stanford University

ALA Subject Analysis Committee (SAC)
Cate Kellett, Yale University

Funding Research Opportunities Grant (FROG)
Chair, Jessie Tam, Thurgood Marshall State Law Library (2019-21)
Rep.-at-Large: Heather Buckwalter, Creighton Univ (2019-21)

LSRD-SIS Reps: Marjorie Crawford, Rutgers Univ. (2019-21), Jennifer Friedman, Univ. of California, Los Angeles (2020-22)

Greetings, friends and colleagues. I am very pleased to be writing this column as the first Chair of the Library Systems and Resource Discovery Special Interest Section—a.k.a. the section formerly known as OBS. It was so gratifying to see the efforts of several years of executive boards, guided by the input and feedback from our membership, finally culminate in the vote at our annual Business Meeting, overwhelmingly in favor of the new section name, which hopefully does a better job of representing the work we all do in law libraries today.

As a member of the Executive Board for the past three years, I have been fortunate to work closely with the outstanding recent chairs of our section—Jennifer Noga, Jackie Magagnosc, Jessica Pasquale—and also to see the way the board runs like a relay race, passing the baton from year to year to reach a common goal. The section name-change is a perfect example of that teamwork. The results of the OBS membership survey in spring 2017 led to the designation of a Special Committee on Repositioning, which resulted in a re-focusing of the “Object” portion of the section bylaws, which was then approved by the membership at the 2018 Business Meeting; in turn, that led to an extended conversation with the membership throughout 2019 about the possibility, and then about the specifics, of a name-change; then when there seemed to be a consensus, we formed another special committee to amend the section bylaws, and both the new name and the updated bylaws were approved by the membership at the 2020 Business Meeting. Whew!

And what a time to be heralding this new version of ourselves! It seems everything is changed this year, and “in these unprecedented times”—a phrase we’ve all heard so many times in 2020—our colleagues on the Annual Meeting Planning Committee, on section boards, and on our education and professional development committees showed just how amazing they are, pivoting to an all-virtual conference and creating the first (but hopefully not last) TS/OBS Summit on really quite short notice. Our joint summit was nearly as substantive as a full conference just on its own, including two programs and three hot-topic sessions, and with a lot less overlap of all those meetings where we really get to know each other. Regardless of what 2021 holds for us in terms of an in-person conference, I am really looking forward to a TS/LSRD Summit.

So, read on for reviews of all the great conference programming from the summer, and please keep coming up with new ideas for programs in the coming year and beyond. I can see from reviewing the IdeaScale site that LSRD and TS members were busy adding topics and up-voting them, so we should have lots of great options to develop into programming for the next annual meeting and summits to come.

As a final note, I would like to thank Jackie Magagnosc and Barbara Szalkowski for their service on the Executive Board these past several years: Jackie is cycling off after her three-year chair term, and Barbara completed her second stint on the board. I have greatly enjoyed working with you both, and I suspect we’ll work together again on new projects. We are joined this year by Larissa Sullivant, who comes on to the board as Vice-Chair/Chair-Elect, and Keelan Weber, who comes aboard as our newest Member-At-Large. OBS was a part of AALL for over 40 years, but now we begin a new chapter in the story of our section. It’s my great pleasure to welcome Larissa and Keelan to the board and to welcome all our members to LSRD!

Kevin Carey
Ohio State University
Greetings TS-SIS Members,

I hope everyone is well and safe during this transformative time.

Despite the onset of the coronavirus pandemic early this year, I write with much enthusiasm and gratitude as I prepare to serve TS-SIS as Chair, 2020-2021. Aspects of our lives have changed forever. New ways of working and living abound, presenting opportunities for growth and change. Even with so many adaptations, many intangibles remain the same.

I am grateful for the unchanging mission and core values found within TS-SIS. This section supports members and promotes the profession in meaningful ways. The most recent example occurred on July 27-28, 2020, when TS board members, committee chairs, and members embraced a challenging circumstance and delivered an outstanding virtual conference. The two-day OBS/TS Virtual Summit conceptualizes the value this section provides to members.

TS-SIS members must know how the summit came to be, and the following is an abbreviated version of the events that transpired. After hearing the news that AALL was preparing to organize a virtual conference without Special Interest Sections meetings, the TS Executive Board and Committee Chairs took charge. They began discussing possible venues and opportunities to present programs, roundtable discussions, and meetings to members. The team generated and moved forward with the idea of a two-day summit incorporating the LSRD-SIS, formerly OBS-SIS. On short notice, TS and OBS board members, chairs, and members worked to plan and convene programs and meetings of great interest and value to both communities. You must know that, without a doubt, the 2020 OBS/TS Virtual Summit was an outstanding experience. Afterward, meeting hosts and leaders reported a record number of session attendees. If you were not able to attend at the time of the event, you are not out of luck. Recorded sessions are available for viewing on the TS-SIS website. [https://www.aallnet.org/tssis/education-training/annual-meeting/2020-annual-meeting-information/2020-handouts].

Thanks to each one who coordinated incredible meetings, shared their knowledge, led roundtables, or participated in discussions. Thanks to Marijah Sroczynski, website coordinator, for working with AALL to post the programs. As I have said before, TS members rock!

Last year as vice-chair, I conducted two surveys, the Biennial Membership Survey and the Annual Volunteer Survey. Each survey garnered responses from approximately 35 members.

Members received the Membership Survey, conducted on even years, between February 3 and March 11, 2020. Below is a summary from the responses:

- 78% Worked in a law school
- 40% Worked in a law library for over 20 years, and 39% have been TS members over 20 years
- 98% Neutral to Very Satisfied with TS membership
- 97% Neutral to Very Satisfied with new committee structures
- 96% My Communities somewhat helpful to very beneficial
- 94% Indicated TS-SIS Website was beneficial
- 76% Read TSLI regularly, and 55% Read TSLI in its entirety
- 70% Requested Tech Tools and related training
What did responding members not know about TS-SIS?

- 37% Working Groups: (1) Classification and Subject Cataloging Advisory and (2) Descriptive Cataloging Advisory
- 22% Working Group: Vendor-supplied Records Advisory
- 48% SACO Law Funnel
- 25% Standing Committees: (1) Resource Management and (2) Metadata Management
- 30% ALA Liaisons: (1) SAC, (2) MARC Advisory, and (3) Committee on Cataloging
- 39% FROG (Funding Research Opportunities Grant) Committee

Many takeaways emanated from the survey. Two primary areas to focus on for the coming year are to:

1. Improve communications among members and committees about the extraordinary work within TS-SIS
2. Provide or partner with AALL and other organizations to offer technical, cataloging, and additional educational opportunities for TS members

Members made several specific requests for learning opportunities in the survey. The Professional Development Committee Co-Chairs, Lauren Seney [Lauren.Seney@colorado.edu] and Jennifer Mart-Rice [martricej@wlu.edu], now have these requests. If you have ideas that did not get into the survey, please send the information to the Professional Development Committee Co-Chairs.

This year’s Volunteer Survey was open between April 16 and June 3, 2020. The volunteer survey garnered a small but incredible group of new and seasoned members willing to commit to TS service despite adjusting to restrictions and lifestyle changes due to shelter in place mandates. To those who stepped up, thank you for your volunteer spirit. I encourage those who wished to volunteer, but could not, to become engaged in TS as opportunities present themselves this coming year. Submit comments and suggestions to My Communities [https://community.aallnet.org/home] when members solicit advice, respond to member surveys, and offer recommendations.

For new members and seasoned members who have not signed up, My Communities is the social networking component of the AALL website. This area is where Special Interest Sections and committees share information, promote events, and communicate. If you are not familiar with My Communities, the site is https://community.aallnet.org/home, and a quick start guide is available here: https://higherlogicdownload.s3.amazonaws.com/AALLNET/e4dbfc8d-7cb6-4de5-af0e-d966313dba57/UploadedImages/My_Communities_Quick_Start_Guide_FINAL.pdf.

TS needs to hear from you, so check it out and get active!

Carol Morgan Collins
University of Tennessee

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ACQUISITIONS

Acquisitions in the Time of Pandemic

David Sanborne
Cook County Law Library, Chicago

In my previous column, I discussed the difficulties of law library acquisitions in the face of the COVID-19 pandemic. Unfortunately, since that time, not much has changed. The negative impacts of the pandemic continue, disrupting day to day library operations and wreaking havoc on library finances. The slightly less bad part of this, from a library perspective, is that publishers are in a more or less similar situation. In an ideal world, this would cause publishing houses to
realize that they need their customers more than their customers need them, and that constant runaway price increases will prevent anyone from being able to afford their products and ultimately be bad for business. Unfortunately, modern capitalism in the United States demands that publicly traded companies report ever-increasing profits. While library collections will suffer from these practices before it will start to hurt publishers, the current model is fundamentally unsustainable, and, eventually, it will harm everyone.

At least in Cook County, there have been some gestures from vendors to make allowances for the pandemic situation. Both Thomson Reuters and Lexis have made allowances for limited remote public access at no additional cost. Because there is no national pandemic mitigation strategy, it appears that physical distancing is the new normal for the foreseeable future. Whether vendors will continue to be as generous as they have been in providing access to subscription resources, when access to physical library locations continues to be limited for more than six months and potentially years, is yet to be seen. What the post-pandemic publishing and library landscape will look like is equally unknown. At this point, so much is unknown that making concrete plans about even several months from now seems overly optimistic. Instead, both libraries and people in general might be better off developing strategic principles that can be applied to the upcoming situations. With legal publishing, this is more difficult as virtually every title from the major publishers is not a discrete work but a long term subscription, which requires longer-term planning.

For the Cook County Law Library, so far, vendors have been cognizant of these issues and have done their best to accommodate. But so far what has been presented are short term solutions to what is increasingly looking like a long term problem. At this point, the barriers to building a comprehensive law library collection are not ones that libraries can overcome indefinitely on their own. It is time for publishers to seriously reconsider their models, for their own sake.

Endnotes

2. “Either we will establish an ecological society or society will go under for everyone, irrespective of his or her status.” - Murray Bookchin, The Next Revolution: Popular Assemblies and the Promise of Direct Democracy (Brooklyn: Verso, 2015), 91.
Six task forces:
• CC:DA Task Force on the “Proposal on Changing Procedural Guidelines for Proposed New or Revised Romanization Tables”
• CC:DA 3R Task Force
• Virtual Participation Task Force
• CC:DA Procedures Review Task Force
• CC:DA RDA Beta Toolkit Training Investigation Task Force
• Cataloging Code of Ethics Feedback Task Force (formed at Midwinter; postponed because of the pandemic; still in process of formation)


Library of Congress Liaison Melanie Polutta gave a report. Highlights:
• Reopening milestones:
  - Phase 1, part 1, June 22: 5% of staff
  - Phase 1, part 2, July 20: more staffing onsite as local conditions permit

• Staffing continues to change: Retirements (Karl Debus-Lopez, Leslie Hawkins), new hires, other staffing changes (Clara Liao as one of the section heads, Policy, Training, and Cooperative Programs Division (PTCP); Aaron Kuperman, Acting Law Section Head)
• Documentation changes (Descriptive Cataloging Manual, Policy Statements, markup for policy statements (close work with PCC))
• Literature policy: Decision to use commonly identified titles for poetry collections of single agents has been officially adopted; streamlined work and reduced need for authority work.
• BIBFRAME: conversion specs being worked on; test files available from this latest version of specs
• Subject cataloging: LCSH online training has been fully completed, and the LC Classification online training has likewise been completed and mounted on LC’s Website. Training includes lectures and training exercises.


Report from CC:DA Task Force to review the Proposal on Changing Procedural Guidelines for Proposed New or Revised Romanization Tables, Peter Fletcher, Chair. Highlights:
• Suggestions for improvements. Main points:
  - LC revision document didn’t address current procedures that LC already has. This information is on the website and could be included into the LC document.
  - Role of CC:DA and CC:AAM (Committee on Cataloging: Asian and African Materials): CC:AAM will vote on Romanization tables for their languages; historically, that has been the case. CC:DA and CC:AAM have historically been distinct bodies on voting with respect to New Romanization bodies.
  - Chairs should be informed of Romanization table proposals. In the case of languages not covered by CC:AAM, the revision first goes to the relevant language body (e.g., Slavic) and then goes to the CC:DA for vote. Strictly speaking, however, CC:DA does not include languages within its remit.

• Reasons for new proposal guidelines: staffing issues, revitalization of the process, better collaboration with stakeholders
• Technical guidelines not to be changed
• Questions from CC:AAM meeting in June: who constitutes Romanization review board?
  - High level review board proposed during CC:DA meeting (some questions still remaining to be hashed out)

• Recommendation made during discussion of report for joint report from both CC:AAM and CC:DA tasks forces on Romanization: confer outside of meeting with CC:AAM for combined report

Day 2, Monday, July 13th: 2:00-4:00 Eastern/11:00am-1:00 Pacific

Report of the ALA Representatives to the North American RDA Committee, Stephen Hearn & Dominique Bourassa. Highlights:

- RSC membership changes:
  - Gordon Dunseire’s term as Technical Team Liaison to the RSC and chair of the RSC’s Technical Working Group will end on December 31. Damian Iseminger (LC) has been chosen to succeed him on January 1, 2021 for a two-year term. Until then, Damian will serve as Technical Team Liaison-Elect
  - Honor Moody (Harvard University) began her two-year term as Examples Editor on January 1, 2020
  - In June, Thi Bao Tran Phan (LAC) replaced Nathalie Mainville as Canadian Committee on Cataloguing (CCC) Representative to NARDAC

- NARDAC’s Terms of Reference document won’t be affected by CORE

- Efforts continue to form the Africa, Asia, and Latin America and the Caribbean RDA regions

- At the January meeting, the RSC discussed operational plans, best practices for asynchronous meetings, and fast track changes. Members evaluated discussion papers on string encoding schemes, content elements, implementation scenarios, and four fast-track change recommendations. Meeting minutes are available here: [http://www.rda-rsc.org/sites/all/files/Minutes%20Public%20January%202020%20meeting.pdf](http://www.rda-rsc.org/sites/all/files/Minutes%20Public%20January%202020%20meeting.pdf)

- 3R Project
  - RDA project switchover remains December 15, but no plans to take down current documentation
  - Improvement of searching and filtering in search functionality
  - Free training available from the RSC Youtube channel ([https://www.youtube.com/c/RDAToolkitVideo](https://www.youtube.com/c/RDAToolkitVideo))
  - The RDA Lab Series will be presented from June 30 to December 8, through ALA eLearning


Report on the CC:DA 3R Task Group, including discussion of revised proposal to add the RDA element curator agent of work, Bob Maxwell, Chair, CC:DA 3R Task Group, and Karen Stafford, Liaison, Art Libraries Society of North America (ARLIS/NA). Highlights:

Maxwell reported the following activities since ALA Midwinter:

- 3R Task Group remained in place as a sounding board for NARDAC to talk through proposed changes to RDA

- Main project in last 6 months was the Curator proposal, originally submitted by ARLIS
  - Stafford spoke on proposal to introduce element sets “Curator agent of work” and “Curator agent of work of”

- Presentation on possible modeling
  - Four possible treatments:
    - Shortcut between an agent and an exhibition corporate body.
    - Shortcut between an agent and an item
    - Shortcut between an agent and a manifestation
    - Shortcut between an agent and an exhibition as an aggregating work. **Preferred by ARLIS.

- Dominique Bourassa explained “shortcut” in RDA:
  - A shortcut is a way to elide over entities that are not of interest for the purposes of description: e.g., (1) Manifestation to (2) Expression and (2) Expression to (3) Work à (1) Manifestation to (3) Work
  - i.e., a shortcut cuts out the “middle “entity in a series of entities concatenated.
• Curator - relationship to an item, without having to describe exhibition/catalog

• Shortcuts should be modeled to offer other possible solutions to other issues

• Proposal was shared with LC and Canadian Committee on Cataloging as a learning project

Report from the PCC Liaison, Everett Allgood. Highlights:
• Two new task groups for LD4P (PCC groups on expansion of cataloging for Sinopia; PCC application profiles)

• PCC Virtual meeting scheduled for August 18, 2020

• Completed pilot mapping App I current appendix → Beta toolkit

• Mapping, Wikidata ←→ MARC21

• Standing Committee on Standards:
  - Dealing with policies for diachronic works
  - Treatment of non-human personages and pseudonyms
  - Language code task group — considering ISO-639-3 instead of current MARC list, which is more restrictive

• Standing Committee on Training:
  - FAST training formed
  - NACO Participants’ Manual draft revision completed
  - FAST training for PCC task group
  - Sinopia training task group

Day 3, Wednesday, July 15th: 1:00-3:00 Eastern/10:00am-12:00 Pacific

Work and plans for CC:DA, Chair, Amanda Ros. Highlights:
CORE survey
• CC:DA charge under CORE?
  - OK, minor changes only needed

• Are we reaching the right audience
  - LITA & LLAMA under CORE umbrella - opportunities to reach out (also, possible representation from LITA & LLA-MA to CC:DA)

• Does your group or activity need to continue?
  - YES. No groups identified that CC:DA might/could/should merge with. Should be a future agenda item for meetings as CORE develops

• Cataloging Ethics Task Force
  - Cataloging Ethics document released, but committee still being formed

• Procedures Task Force
  - Comment: Watching Curator proposal for further developments

• 3R Task Force
  - Comment: Good to continue for ideas from NARDAC/RSC representatives
  - Comment: Recommended to keep task force active while 3R Project still being completed
- Virtual Participation Task Force
  - Suggestion for a logistics team
  - Suggestion for a possible additional intern
  - Future meetings may change if ALA dictates another platform, etc.
  - Comment from the CC:DA chair: CC:DA didn’t have go through ALA because of pandemic; perhaps work with CORE/ALA for a standing schedule as well as a more uniform online platform (considering both for online meetings as well as archiving recordings of meetings)
  - Comment: Use CORE survey to address platform/archiving needs

- RDA Toolkit Training Task Force
  - Timeline pushed back due to pandemic
  - Ongoing work; only paid training identified (expensive)

- Romanization Tables Task Force
  - Report being revised; still some unofficial meetings to be had with CC:AAM
  - Questions from CC:DA-CC:AAM liaison (Jia Xu) - understanding to make sure joint reporting from joint task forces/CC:AAM level
  - Comment on clarification for responsibilities

- ALCTS/CaMMS Subject Analysis Committee’s Subcommittee on Faceted Vocabularies (SSFV) - Best Practices for Recording Faceted Chronological Data in Bibliographic Records (Version 0.9)
  - CC:DA Task Force to be formed; charge approved

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Using ClassWeb, Part I

During this enforced time away from the office, I have been doing very little cataloging. I had compiled a whole list of database maintenance and continuing education projects, among which was getting up to speed on parts of ClassWeb which I did not use. ClassWeb is a subscription service from the Library of Congress that makes subject cataloging so much easier for those institutions that are willing to pay for a subscription. ClassWeb is available online at: Classweb.loc.gov.

With ClassWeb, I tend to use the same features over and over again, but I underutilize much other functionality. I have compiled some guidance for law catalogers who may be less familiar with ClassWeb, or who, like me, have only used some parts of the system. I hope to address further aspects of ClassWeb, such as advanced keyword and Boolean searching, in a follow-up column. Please also send any suggestions you might have. All usage statistics cited are as of August 24, 2020.

**Finding an LC Classification Number Using Bibliographic Correlations:** The easiest way to find an LC classification number when you already have the primary subject heading is to use the Bibliographic Correlations option on the bottom of the main menu. Clicking on “Browse” under Bibliographic Correlations brings you to a large menu. The first and most frequently used option for me is: LCSH to LC Class number. This correlates the first-used subject heading with the LC classification number used on bibliographic records in LC’s catalog. If you search “Toxic torts—United States,” you find that “KF1299.H39” has been used twenty-five times, KF1257.Z9 a total of three times, and other class numbers less often. The class numbers listed for the correlation are all hotlinked to the classification schedule. It is important to click on the link to check the number you wish to use to see if it is appropriate and still valid. If you were to
click on KF1257.Z9, you would see that this number is no longer used (the .Z9 form division for Table VI in the U.S. form tables was discontinued years ago, but it still appears on many legacy bibliographic records. If you were to do a search for Securities—United States, you would get a selection of numbers: KF1439/1440 being used most often (range KF1431-1440), but KF1070 (range KF1066-KF1070) is used quite a bit, too (in addition to the non-legal HG number). The securities number in the 1400s is “Issuing of securities” and is under Corporate finance; KF1066-1070 is under Marketing of securities/Investments/Stock exchange transactions.

If the LCSH-LC classification number brings back no correlation, or an unsatisfactory correlation, any of the following options might help: If you need a number for an American state covered in the KFA-KFZ state table (covering all states except California and New York), check if the topic correlates to a number used for another state from the same table. Since each state in the table is assigned 600 numbers, the topic should be in the same place in the table. Simply add the number in the form table to your base number.

Example: You have a book on air pollution law in Alabama. When you do an LCSH-LCC correlation, there are no hits for Air pollution—Law and legislation—Alabama.” However, the same topic for Arkansas retrieves KFA3958. Arkansas’s range of numbers is KFA3601-4199, so the number for air pollution is 358 in the table. Alabama’s range is KFA1-600, so check KFA358 in ClassWeb. That number is correct for air pollution law in Alabama.

The same technique often works when the jurisdiction in question is covered by a regional table, for instance, KJZ-KKZ1: Europe; KL-KWX4: Civil law for Asia, Eurasia, Africa; KDZ-KHX2: Latin America and the West Indies. KJZ-KKZ1 and KL-KWX4 tables are also very close, so numbers are mostly the same in both.

Example: There is no correlation for Accomplices—Latvia, but Accomplices—Italy yields: KKH3922. Latvia uses KKI1-5000, so Accomplices—Latvia would be KKI3922. If you have a book on Accomplices—Malaysia, you won’t find a correlation in ClassWeb, but you can add the same “3922” to the class number for Malaysia, KPG, to yield: KPG3922. In all cases, you would want to verify your number by doing a ClassWeb browse.

Class numbers are mostly parallel for KJC (European comparative law), KJE (European Union and other European regional land integrated law), and KK (Germany). The German class numbers were used as a basis for both the KJC and KJE schedules.

Example: Environmental law in Europe: KJC6242; in the EU: KJE6242; and Germany: KK6242. If you can’t find a correlation under one of the three jurisdictions, try the other two. (If you need a class number for EU law, and one exists only for German or European law, propose a new number through SACO independently or through the SACO Law Funnel).

If you still can’t find a good class number, look for the correlation for a broader subject heading one more level up in the hierarchy or a correlation for a related subject heading. If that doesn’t work, try searching by successively broader subject headings. Alternately/additionally, try using the LC Classification “Search” option explained below.

Browse or Search: The first menu option is for LC Classification, browse or search. Browsing is more straightforward than searching, though searching is far more powerful. You can browse by class number, caption, index term, or caption and index term. You can search by any of the same options plus keyword.

Browsing by LC classification number: If you decide to browse by LC class number, then you need to choose which browser you will use: Standard Browser, Enhanced Browser, or Hierarchy Browser. You can set up a default to any one of the three browsers. You also have the option of changing the browser used any time you search. I have set my preferences to default to the Enhanced Browser. This browser is ideal for finding LC class numbers for legal resources. It automatically calculates class numbers from subject and form tables. The Standard Menu does not. For example, if you do a classification browse using the Standard Browser for K3239.6, you will get K3236-K3240, with instructions to use Table K7. If you click on the link to Table K7, you will find that “4.6” from the form table is added to K3236 to construct the number for Human rights—Dictionaries. However, if you search K3239.6 with the Enhanced Browser, ClassWeb will do the grunt work for you, and you will be led directly to K3239.6. In this case, the Hierarchy Browser works
Similarly to the Enhanced Browser. Browsing by caption, index, or caption and index term are also possibilities. I discuss more about caption and index terms below.

**LC Classification: Search:** I strongly recommend reading the ClassWeb Help before using LC Classification search (or any of the other search, as opposed to browse options). The link to ClassWeb Help is given in the bottom right hand corner of the main menu. The search options are very powerful but rather idiosyncratic and unintuitive. Before doing a search, it is very important to click on the “search options” link in the lower left of the screen. Among the many options presented there, you are given the choice of doing a browse search, a basic query, or a Boolean search. Query and Boolean searches will be covered in my next TSLL column. Let’s focus on browse search for now, which is the default in my setup. When searching by classification number, you also need to decide whether to search the schedules, the tables, or both. It is similar to doing a search using the Standard Classification Browser. If you need to search a number in the schedules, rather than the tables, always select “schedules.” “Both” will not work. Try searching for KK6242 (Environmental law—Germany), and you will see what I mean. Kind of confusing, isn’t it?

**Example:** Click on “browse” and “schedule” for K3240. It will take you to K3240.5 instead, because there is no entry in the classification schedule exactly corresponding to K3240. You will find it by searching the exact range or by searching the beginning number of the numbers assigned in the form table: Input K3236-3240, or K3236-

**Example:** Click on “browse” and “both” and search for KKT507 (Limitation of actions—Spain). If you search for a number that exists only in a form table, you need to put the exact name of the table followed by exactly one space and the number in the table you are looking for: Use: KJ-KKZ1 507. However, it gets even trickier. If you searched KK-KKZ1 500 (Civil law—Spain—General), you are brought to a bracketed: KJ1-4999: History of law : Europe. To find “500,” you need to search: KJ-KKZ1 491-500, which is the actual entry for “Civil law: general” in the regional table. If you then click on “491-500,” you are brought to the Classification Browser. That entry indicates this range is divided by Table 9a. If you click on “9a,” then you can actually find an entry for “500.”

Class number searches retrieve valid class numbers (field 153 of classification record), invalid class numbers (field 453), and see also valid number tracing (field 553) appearing in MARC classification fields.

**Searching by caption, index, or caption and index term:** “Caption” is the most specific entry, and the last element to the right, in the record’s hierarchy (MARC classification field 153 $j). This search is good if you know the first word, or entire caption if it is more than one word. In the German law schedule, KK2012 has many elements in the hierarchy (MARC 153), all coded in separate $h, except for the last element, the caption, coded $j: Snow removal. Sanding of streets. Streupflicht. If you search the caption in ClassWeb, you must begin with the first word; if you search “Sanding of streets” alone or in combination with “Streupflicht” without the first word, you will get no hits. Searching by the indexing term: This search will retrieve terms appearing in MARC classification field 753, sorted on $a, followed by $b. In the case of KK2012, an index search by the first or second phrase of the caption, “Snow removal” or “Sanding of streets” retrieves the correct number. “Streupflicht” will not retrieve the classification number, presumably because many foreign terms are not indexed. Searching by “Caption or index term” rather than by caption or index term alone seems to offer more bang for the buck.

**Searching by keyword:** This is a useful search if you are uncertain of the terms used in caption or index. It is a very broad search and retrieves all terms appearing in the hierarchy and captions (153 $h and $j), the index field, and explanatory text ($i) in various note fields such as field 680 (scope note). Keyword searching has a default of “truncation support.” This means that searching “eviden” will retrieve evidence, evident, evidential, and evidentiary. Both the large number of indexed fields and the truncation support lead to frequently very large result sets. The result sets can be narrowed by doing exact keyword searches. To do so, click on search options, and then exact match, before performing the search. Two wildcard characters are supported in keyword searching. An asterisk matches zero or more characters, and a question mark matches one character. The keyword search’s default is to “AND” your search terms together. If you wish to perform an “OR” search, select “Any matching term (OR search)” under search options.

**Example:** Keyword search for “Evidence” retrieves 733 results. Without examining the actual MARC classification records, it can be hard to figure out why a particular record is retrieved. KF8968.19 “Business appraisers” has the word
“Evidence” in 2 instances of the hierarchy (153 $h). ClassWeb Help erroneously states that the keyword index includes 153 $i, which is not a valid subfield, but does not list 153 $h (hierarchy), which appears to be indexed, given the “Evidence” and other cases I have found.

**Limiting searches to a subset:** When using either “browse” or “search” to find an LC classification number, you have the option of limiting your search to one of 41 subsets, including 13 different Class “K” subsets. I think this option works well in “search,” but I don’t find it useful in “browse.” Click on the option “subsets” appearing under LC classification near the top of the screen.

**Example:** Let’s say we want to locate English, Canadian, and American law numbers for air pollution and narrower topics within air pollution. Check KD, KE, and KF under subsets, and then check “OK.” Then search by keyword “Air pollution.” Twenty-five results are retrieved.

**Combining two or more searches:** One can also combine two or more searches.

**Example:** Classification number: KK and keyword: evidence leads to 114 results; or searching by KK and caption or index term: evidence: fifteen. Doing an LCSH-LCC correlation for Evidence (Law)--Germany leads to fewer, presumably more focused results.

More on ClassWeb in the next column!

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**Collection Development**

**Law in the Machine: Lex Machina celebrates its 10th anniversary**

Adrienne DeWitt
Campbell University

I have taken more webinars in the past five months than I have in my entire career. After the AALL conference in July, I decided to take a break from webinars for the time being, with one exception: Lex Machina. This year, Lex Machina celebrates its 10th anniversary. Where it was once a Stanford University startup, it has since grown into a major player in legal analytics. Since my library does not subscribe to Lex Machina, the webinars were a great opportunity to learn more about it.

For those unfamiliar with Lex Machina, it is an AI legal analytics company that rests under the LexisNexis umbrella. Although it is part of Lexis, it is still its own company. Subscribers have their own username/password. Lexis passwords will not work for Lex Machina.

There is a modified version of Lex Machina available on Lexis. I consider it to be more of an advertisement for Lex Machina than an actual analytic option. If you pull up an opinion, you will see on the right sidebar, under the Shepard’s information box, a box that reads Legal Analytics (Fig 1). Clicking on that gives you a link to Lex Machina’s analytics of one of the attorneys involved with that case (Fig. 2).
Lex Machina has an interesting backstory. Its roots go back to around 2007, when Patent Monetization Entities (better known as patent trolls) were going after tech companies so they could win money damages.¹ Tech companies were particularly susceptible to patent trolls and often found it cheaper to settle out of court than to litigate.² After a while, tech entrepreneurs grew tired of the attacks, and a group of tech companies partnered with professors from Stanford Law to create the Intellectual Property Litigation Clearinghouse.³

IPLC’s main purpose was to collect data on patent litigation, but in doing so, it also uncovered a vast amount of uncollected litigation data. At the time, reputation and personal experience—what some refer to as ancedata—controlled litigation.⁴ CEO of Lex Machina Josh Becker stated, “No one was keeping score.”⁵ A machine learning system capable of efficiently decoding large amounts of litigation data was increasingly necessary.⁶ Thus, Lex Machina was born.

2010 marks Lex Machina’s official anniversary. In 2010, Lex Machina had outgrown its academic beginnings and was released onto the commercial market. Becker assumed the role of CEO, and by 2015, AALL named it the New Product of the Year.⁷ 2015 was also the year Lex Machina was acquired by LexisNexis.⁸

In 2018, Lex Machina moved into the state analytics market with its Delaware Chancery court module.⁹ Reaching beyond its IP beginning, the Delaware Chancery module contained over 6,000 cases that included antitrust, securities, commercial, bankruptcy appellate, products liability, and labor.¹⁰ This year, Lex Machina launched its State Law Modules that include three state courts: Los Angeles Superior Court, Harris County District Court, and Harris County Court (Harris County is Houston, Texas).¹¹

Today, Lex Machina is considered a “granddaddy of legal tech companies.”¹² Its endurance in a highly competitive field,¹³ combined with its remarkable growth, demonstrates how important analytics are in practice (Fig. 3). Where analytics were once an interesting aside, in today’s practice of law, analytics might mean the difference between winning or losing a case.

In a recent Lex Machina webinar, Jean O’Grady, author of Dewey B Strategic blog, explained that analytics have “gone from being something that was alien and exotic to being very mainstream . . . if you don’t have analytics, you are really at a disadvantage.”¹⁴ She further stated, “Lawyers who are paying attention really need to have a handle on analytics.”¹⁵ Greg Lambert, co-host of Three Geeks and a Law blog, added, “I had an attorney who came to me and said opposing counsel punched him in the mouth with analytics in court, and he wanted to know what they had to do to get up to speed with being prepared with analytics, because it’s no longer optional.”¹⁶

If you are interested in Lex Machina, but you don’t have a subscription, check out its COVID-19 Impact Analyzer. It’s a free resource that provides information about the number of new case filings by practice area, complaints that mention COVID-19 or related terms, and findings (court enforceable determinations). You can find the COVID-19 Impact Analyzer at https://bit.ly/31gvBEu. For more information about Lex Machina, check out their website at https://lexmachina.com/.
Endnotes

2. *Id.*: By 2013, Lex Machina had found that most patent troll cases rarely proceed to trial and that 75% of terminated cases filed by trolls ended in a settlement. Stephen J. Vaughan-Nichols, *56 percent of all patent lawsuits are made by patent trolls*, ZDNet (Apr. 11, 2013, 16:50), https://zd.net/3hbMohw.
4. *Id.*
5. *Id.*
8. *Legal Analytics Shop Talk, supra* note 5.
10. *Id.*
15. *Id.*
16. *Id.*

CONFERENCE ROUND-UP

Jackie Magagnosc
Cornell Law Library

Welcome to another installment of TSLL’s “Conference Round-up.” The goal of this column is to facilitate sharing of conference experiences beyond AALL’s Annual Meeting. This issue features reports from The Exchange2020, NASIG, and the American Library Association’s Annual Conference. As has been the case since this past spring, all of these events were held virtually. If you have the opportunity to attend a local, regional, or national conference or workshop with content of interest to technical services librarians and would like to provide a short summary, please contact me at jkm95@cornell.edu.

Exchange2020 for a multitude of interests (by the multitudes of interested)
Jesse A Lambertson
D’Angelo Law Library, University of Chicago
This year, I had the privilege of contributing a lighting round recording to Exchange2020; I had a fun time throughout the three days. The whole thing was a joint collaboration between Association for Library Collections & Technical Services (ALCTS), Library and Information Technology Association (LITA), and Library Leadership and Management Association (LLAMA). The hours of the event were organized over the course of three days, May 4, 6, and 8, 2020, with a few hours given to each of those three days. Unlike many conferences this spring, summer, and now, gulp, autumn 2020, The Exchange was always scheduled to be an online event. Some of the events were live synchronous presentations, and some, like mine, involved pre-recording an audio presentation over some slides, and all featured some kind of chat or forum element for other forms of replies or responses.

Some of you may know about Emily Drabinski, the Interim Chief Librarian at Mina Rees Library, The Graduate Center, City University of New York (CUNY). I met her at ALA in DC in 2019. Her presentation was about, fundamentally, the power of selection and how this contributes to the ebbs and flows of access and interactions between people, managers she has, and those who report to her. It was, to summarize, a Foucault-ian approach to power dynamics in libraries (and thus, by extension, society). This was the opening keynote. I, unfortunately, was not able to attend the remainder of that day (a busy WFH day).

Day 2, which was Wednesday, May 6, 2020, was a series of presentations on Continuity and Sustainability. All great case studies of carrying on and re-working over time.

Laura March and Amelia Gibson, who are both scholars as opposed to library people, focused on disability and services and technology to make services online accessible. This was very helpful, specifically the segment on division of labor in order to develop, implement, and maintain tools used for accessibility online. There are myriad ways to divide labor, but this really drew out the layers of technology and people-oriented aspects of the process.

On that same day’s schedule, Emily Nimsakont of Amigos Library Services laid out some examples of documentation needs, how to get good documentation, and when might be some good times to catch up (do we ever? :)). A crew of folks from University of Chicago library detailed how they had found some super results in hiring from fields outside of libraries into the acquisitions department—with a focus on invoicing, ordering, and customer service.

Before I detail a few examples of Day 3, I have to add that there was ALSO a virtual poster session with a forum of asynchronous comments and questions (mentioned again below in Day 3). Some of the titles of these posters were: “Training the Trainer: Creating an In-House Professional Development Program,” “To Co-Author or Not?,” and “Google Colab: Easy Python Code Execution for Non-Programmers,” among others. There were a total of eighteen virtual poster presentations at the online event!

Day 3, March 8, 2020, was the range of lightning sessions, featuring submitted presentations as recorded audio/visual files. These were then played one after another. There was a live Q&A, but also a forum for registered attendees to ask and then get answers to questions asynchronously. I really liked this part. Full transparency, I enjoyed this part because yours truly submitted one of the sessions on metadata and its aesthetic, but I really enjoyed this interaction and structure. It was a super way to quickly learning a series of ideas presented in a low-stress mode.

There was a very helpful and encouraging session on ORCID, called “ORCID US Community: Libraries Leading the Way for Interoperability in Research & Scholarly Communication Workflows,” by Sheila Rabun. I found this really helpful because it provided a good contact for ORCID and in fact started our library on an ORCID project.

In addition to that one, there was a fabulous session, called “Collaborative Web Content Management Strategies,” by Brittany Richardson. I found this session really helpful because it covered so many aspects of web management in such a short time and taught me a range of things about keeping track of the tools used, their relationships to the public, and regular auditing of these tools, which I have not really thought about too much (especially using that phrase).

It was a very good Day 3! If you have any questions about the rest of the Exchange2020, please feel free to reach out. I look forward to future variations on this event as the three divisions merge into CORE, which is coming into action later this year.
Established in 1985, NASIG (formerly the North American Serials Interest Group, Inc.) is an independent organization that promotes communication, information, and continuing education about serials, electronic resources, and the broader issues of scholarly communication. The schedule for NASIG 2020 was chock full of so many great sessions that three members of the Technical Services Special Interest Section divided up to bring you as much coverage of this virtual event as possible. Some sessions were live streamed while others were pre-recorded. Either way, all sessions are now freely available on YouTube at: https://www.youtube.com/playlist?list=PLfCwmKIIu_VYZfssodxHZ66PJGkSZN4aI

**Opening Session/Keynote - Mapping Domain Knowledge for Leading and Managing Change**

*Narine Bournoutian*
Arthur W. Diamond Law Library, Columbia University

Slides available at: https://www.slideshare.net/NASIG/mapping-domain-knowledge-for-leading-and-managing-change

The keynote speech was given by Janetta Waterhouse, Director of Technical Services/Library Systems at University at Albany.

Waterhouse started by inviting everyone to consider what emotions come to mind when they hear the word “change,” whether it be excitement over new possibilities or fear of the unknown. Her keynote address focused on both leadership in general and specifically leadership during tumultuous periods of change. She invited all participants to use this speech as an opportunity to consider their current skills and identify areas of improvement.

Waterhouse noted that every organization needs leaders from within to be successful. Being a visionary with ideas is different from being able to implement them and balance all the people in the scenario. She felt that leadership is a subset of management, but that you don’t have to be a manager to be a leader. Waterhouse stated that there are essential skills that all leaders need during a change initiative. These include: communication, active listening, time management, productivity, team building, diversity and inclusion, and process/performance management. She also emphasized the importance of leaders “doing the dirty work” along with other staff. At the same time, one cannot forget the essentials of being a higher-up during a change initiative, which includes clearly outlining expectations for all staff members and providing feedback and evaluations to make sure all performance standards are being met.

Waterhouse laid out multiple possible models of change management. These included Kotter’s Eight Steps, the Kubler Ross Change Curve, and Lewin’s Change Model. Each offers different insights in how to manage organizational change and focus on both the practical and emotional aspects of leading individuals through a change initiative.

Change initiatives stem from different sources. There can be both external and internal drivers of change in an institution—Waterhouse noted that the COVID-19 pandemic leading to library budget crises was a good example of a current external driver causing internal drivers of change. Changes can be the result of organizational, technological, and/or cultural factors. Finally, change initiatives could be incremental or transformational, which are often harder to plan for since the ultimate destination is usually unknown.

One barrier to embracing change and leading through change initiatives is fear of taking risks. Waterhouse advised leaders to be models for their colleagues by admitting their own errors during change initiatives or learning new skills in order for others to feel confident in taking their own risks.

Waterhouse outlined different competencies that are essential for leadership, including emotional competencies, managerial competencies, and intellectual competencies. Waterhouse felt that emotional competencies are often undervalued in leadership and that ability and willingness to self-evaluate is most vital for anyone in a leadership role. Other important competencies of emotional intelligence included self-regulation, motivation, empathy, and social skills.

Conflict management is an important aspect of leadership in general and change management in particular. A common perception of conflict is that it consists of either avoidance or confrontation. However, Waterhouse advises to always focus on potential negotiation within a conflict. Part of this involves always ensuring there are multiple channels of communication between all levels within the organization, where information can be shared readily and staff can inter-
act with each other and ask questions.

Part of conflict management during a change initiative is dealing with resistance to change. It is key for a leader to listen and understand the different reasons why staff are resistant to change. From there, one can try to make change appealing by using "attraction strategies" to encourage participation. These include: allow space for staff to participate in planning, leave some choices, share as much information as possible, and minimize all surprises while allowing space to digest new information/big changes.

Waterhouse concluded her session by inviting all participants to think about people they’ve worked with who they have considered to be leaders who lead them through difficult challenges and changing times, as well as those who did not have these qualities. She asked everyone to consider how they would want to be remembered if their colleagues did similar assessments in the future.

**Measure Twice and Cut Once: How a Budget Cut Impacted Subscription Renewals**


This pre-recorded session was presented by Keri Prelitz, Collection Development and Management Librarian at California State University, Fullerton and Greg Yorba, Electronic Discovery Library at California State University, Fullerton.

In Fiscal Year 2018/2019, the Pollack Library at California State University, Fullerton was faced with a 14% cut to the materials budget. As periodicals were 28% of the materials budget, cancellations were necessary. Staff decided to look at subscriptions to electronic titles provided by their biggest vendor, Harrassowitz, in order to see what cuts could be made. After the electronic resources librarians gathered the usage statistics for one year and acquisitions staff collated the pricing, the information was examined by a collection development team consisting of electronic resources librarians, collection development librarians, a reference librarian, and rotating subject librarians.

In order to determine the cancellations, this team used a formula to predict potential interlibrary loan (ILL) costs as well as the cost per use for each subscription. When considering the usage stats for each title, they assumed that one fourth of the uses would convert to ILL requests should the title be canceled. The first five ILL requests are free (anything with less than 20 uses was automatically cancelled), and the average copyright fee is about $30; both of these were taken into account during the consideration process. After all this, the subscription cost for each title was compared to the potential ILL cost if the title was cancelled.

For titles where the costs were close, the team would often keep the subscription for one more year and then review again at the next renewal option. For larger packages, they would look at each journal title individually using the above formula, and then compare the total costs of the “keep” titles to the total package costs to see if individual title subscriptions would be cheaper.

Per Prelitz, other considerations included the following questions: Did these titles contain unique content? Was it being used by instructors? Would there be departmental blowback if cancellations prevented faculty research? Had usage increased over time, or was it likely due to current events? Was the content embargoed on open access or subscribed databases?

Some of the complications of the cancellations were figuring out the specific workflows between the team and the acquisitions staff, contradictory or missing usage stats, and that this may not be the best use of staff time. In addition, serial title changes added an extra wrinkle when tracking usage stats and subscription increases, as did journals being transferred from one online service or package to another. Staff also had to factor in access methods for cancelled titles. Did the library have perpetual access to all issues prior to cancellation or just for a certain period of time?

All together, the library cancelled about 140 titles, which saved about $80,000 annually. However, Yorba noted that as more titles were cancelled, there was the possibility of Harrassowitz’s service fees increasing. This was avoided by
moving many subscriptions provided directly by publishers to a Harrassowitz provided one—a move that required a lot of work from both library and Harrassowitz staff.

Prelitz concluded by talking about expected changes in future annual cancellation reviews. She noted that staff could combine this work with the Association of College and Research Libraries (ACRL) statistics collation to save time and double counting of usage statistics. They also made changes to the formula to calculate ILL costs, as copyright costs were different than originally assumed. Finally, in addition to cancellations, this workflow will also include considerations on adding new subscriptions based on the frequency of ILL requests.

The Serial Cohort: A Confederacy of Catalogers

This pre-recorded session was presented by Mandy Hurt, Serials Description Coordinator at Duke University. In 2018, Duke University Libraries restructured their technical services department, resulting in the need to expand the skillsets of existing staff members to perform essential tasks, including serials cataloging. The department decided to form a “serials cohort” of monographic catalogers who went through the Library of Congress’ Cooperative Online Serials Program (CONSER) training materials and met weekly to discuss it. The goal of these meetings was to develop complex original serials cataloging skills. After going through the CONSER training, staff still felt they needed more training and feedback. Therefore, a more formal cohort was established, with two catalogers as co-conveners, which would meet monthly to review serials cataloging problems as a group.

However, some challenges emerged with this arrangement. Everyone had other duties to manage on top of the serials cataloging work, and it was often hard to coordinate a meeting time each month. It was decided to form a much smaller test study cohort, with Hurt as the sole conveners. In addition to the monthly meetings, the cohort members could send Hurt up to three serial records per week for review in order to receive regular feedback.

Once the level of serials cataloging increased, the cohort meetings increased to twice weekly, with additional “homework” using dummy serial volumes that Hurt created. This smaller group and more regular meetings made it easier for each staff member to receive more specialized feedback and training geared towards the specific material they were working with.

This first generation cohort has produced two highly competent serials catalogers who contribute much needed skills to the technical services department. Hurt reported that the department is currently examining the cost benefits of forming a second generation cohort and departmental needs.


Slides available at: https://www.slideshare.net/NASIG/when-to-hold-them-when-to-fold-them-reassessing-big-deals-in-2020

This pre-recorded session was presented by Elizabeth Parang, Research and Instruction Librarian, Pepperdine University, and Jeremy Whitt, Head of Collection Development and Assessment, Pepperdine University.

Although cancellations of big subscription packages have been covered in recent library news, studies and reports often focus on larger research-intensive universities. Therefore, the presenters felt that their experiences at a mid-sized university like Pepperdine would offer a different perspective.

Parang noted that Pepperdine’s big deals were initially negotiated at a favorable rate by a consortium, which made it easier to convert print subscriptions to online packages and obtain subject collection subscriptions. This also allowed for remote access for all patrons and no duplication of subscriptions across different libraries, which led to overall savings. However, costs increased over time, and not all the titles in these packages were relevant to user needs. Given that non-journal resources like databases were greatly in demand, the budget couldn’t handle the additional costs without cutting elsewhere.
Liaison librarians at Pepperdine (staff whose responsibilities include reference, instruction, and collection development) meet annually to discuss the use of resources by patrons and requests received to purchase additional ones. They examine cost per use, overall costs, and trends in usage to help determine cancellation and acquisition decisions. Whitt outlined other cancellation considerations, which included the following questions: Is a multi-year license nearing expiration? What percentage of the package is little-to-no use titles? Would there be any savings in a title-by-title subscription for high use titles? Are the resources/articles available in another form? Will the library be able to maintain resources at probable subscription increases?

Parang then gave examples of big deal cancellations at Pepperdine and how the library did their best to maintain patron access to titles afterward. The first big deal cancellation was Wiley in 2011. It was the most expensive package at the time and nearing the end of the license period. Pepperdine had perpetual access to all the paid materials after cancellation, many titles in the package were available in other databases with an embargo, and they pursued article level tokens.

Another batch of noteworthy cancellations were Cambridge University Press, Brill, and University of Chicago Press, due to budget cuts for the next fiscal year. Although the prices had remained steady, statistics showed that only a few titles in the packages were heavily used, and overall usage had not increased over time. Therefore, Pepperdine got individual subscriptions to the high use titles and relied on ILL for the lower use titles.

Finally, Whitt noted a couple of situations where cancellations proved unnecessary. For the Pepperdine subscription to the American Chemical Society package, the publisher was able to coordinate with the library to change the pricing tiers. Similarly, although Pepperdine itself was not able to obtain an institutional discount for the Sage package, their local consortium was able to negotiate a discount to select subject collections, which allowed Pepperdine to pick and choose which collections were worth keeping.

**Analyzing Workflows and Improving Communication Across Departments: A Simple Project Using Rapid Contextual Design**

*Rachel Evans*

*University of Georgia School of Law*

Presenters: Jharina Pascual, Electronic Resources Acquisitions Librarian, University of California, Irvine and Sarah Wallbank, Electronic Resources and Serials Cataloging/Metadata Librarian, University of California, Irvine

This was the first NASIG session I took in this summer. For this session, two electronic resource librarians shared their reasons and approach to an in-depth review of interdepartmental workflows. They employed a specific user experience research method known as rapid contextual design. The book *Rapid Contextual Design: A How-To Guide to Key Techniques for User-Centered Design*, typically used in the field of digital product management, was consulted to inform their evaluation and analysis of their own workflows. The pair used an assessment to uncover key issues within and between departments. They discovered their biggest issue was communication. Their methods for sharing between departments were so ineffective that they were not being used. Communication was not taking place outside the immediate employees responsible for tasks, resulting in confusion and inefficient outcomes. To remedy this, based on the assessment results, they created new procedures including tools for sharing information between departments. This has had major benefits, and in addition to increasing efficiency, the librarians were excited that these improved workflows had built a new sense of community among employees. On top of relaying their own re-designed workflow outcomes, the speakers’ slides were extremely helpful, utilizing diagrams for visualizing your own analysis of local library workflows. The single most important takeaway from this session, though, was not the methodology itself, but the quote that “implementing small changes to address small, simple things” had the biggest impact on intra-technical services communication.
Practical Approaches to Linked Data

Presenters: Heidy Berthoud, Head, Resource Description, Smithsonian Libraries and Jeannie Hartley, Cataloging and Serials Librarian, Friends University

This session proved to be an excellent introduction to Linked Data. It shared an overview of what Linked Data is and demystified the topic with one of the simplest explanations I have heard to date. Specifically, there is not a single definition of Linked Data, and the idea and approach can be applied in small and practical ways. The concept isn’t as overwhelming as it initially seems, and, in fact, there may be a variety of ways that you or your library are already employing Linked Data practices without realizing it. Right away, less than two minutes into the session, excellent resources were shared, including a TED Talk by the one and only Tim Berners-Lee that I highly recommend viewing along with this NASIG session, titled The Next Web of Open, Linked Data. This session also quotes Guerrini and Possemato (2013) as being their favorite definition so far, “Linked Data is a set of best practices required for publishing and connecting structured data on the web for use by a machine.” Again, this session really simplified many ideas and approaches related to Linked Data, including giving a short rundown of the cataloging and metadata standards that work the best if you are setting your library and their resources up for Linked Data practices in the future. These recommendations are ones we are all familiar but may be underutilizing: RDA (Resource Description and Access) and RDF (Resource Description Framework). RDA in particular has been popular due to the ease with which it uses relationship designators, something that is already a part of the RDA vocabulary. RDF is written in XML and works especially well with the semantic web. Both standards have been used to develop Linked Data with library records. As with most talks on Linked Data, resources related to BIBFRAME and URI’s were also shared, including rules for the semantic web.

One of the things I loved about this session, in addition to the practical and simplified breakdown of this topic, were the visualizations shared. I’m a big visual-person, and seeing a diagram of the interconnectivity of the “Web of Things” was a perfect way to illustrate the concept of linked open data to me. This really drives home the original dream imagined by Berners-Lee of Linked Data emerging as “a representation of real things in web format.” As the session continued, speakers shared the many benefits of Linked Data, including interoperability of information and increasing the richness and relevance of search results across platforms. They also shared some of the common challenges we face in libraries when thinking about Linked Data, like missing information for library record fields, hurdles for data conversion, transitioning cataloging standards, and general confusion. I, for one, found this session went a long way in clearing up much of the confusion I have had myself surrounding Linked Data concepts, terminology, and formats. The speakers recommended using tools like MarcEdit that you may already be familiar with to add fields to existing records for creating connectivity points to facilitate Linked Data relationships. About halfway through the session, they began sharing Linked Data projects and other examples from the Smithsonian. It was really cool to see in real time a live screen-shared demonstration of Linked Data (around 29 minutes), yet again using a tool many of us are already familiar with: Google Sheets. The tool shared was built on a Google API developed by Tom Steiner that allows you to type an author’s name and automatically search Wikidata to pull in the Q number for the author, along with a host of other information. There was even talk about using these tools and Wikidata teams in the teleworking environment, making the session even more timely.
I was particularly interested in this session due to the novel idea of librarian sabbaticals. I have to be totally honest; I have never heard of librarians who are typically non-tenure track faculty in my (limited) experience taking sabbaticals. I remember in art school, as an undergraduate, my drawing and painting professor took regular sabbaticals to work on her pieces and to exhibit them in galleries. This same professor was a good friend of one of my earlier librarian mentors who just so happened to be the technical services and cataloging librarian at my undergraduate liberal arts library. I was just a student worker in the library at that time, but many nights as I was closing the library up, I would catch the two conversing over near the reference desk. The artist lamenting her librarian friend’s overcrowded workload, and the librarian expressing “c’est la vie.” They both had faculty status, and neither was tenured. At the time, I did not understand... why didn’t the librarian have just as much freedom to pursue scholarship and follow intellectual curiosity? Surely, a break from routine would benefit the individual and the school both! Now as a librarian myself, I find myself more so questioning this academic class system where tradition is upheld for tradition’s sake. This session was invigorating to hear other academic librarians talk about the pros and practicality of librarians taking a sabbatical. As with many, many sessions at NASIG, a theme you can glean from the title which turned out to be a major benefit of sabbaticals was improving relationships between Public Services (at our institution this is Access Services) and Technical Services departments.

The logistics of the sabbatical were simple, and the goals very specific:

A. Understand the framework for how the work of acquisitions is structured and executed
B. Understand the e-resource lifecycle to bring back critical skills to inform better service desk training

Again, breaking free from the tradition of access services staff not being exposed to e-resource workflows, this idea of a sabbatical provides the opportunity for them to experience and think through the mosaic of processes in their most closely related yet deeply divided sister department. Organized as a 5 month “retreat” of sorts, the librarian was able to see how items are purchased, tracked, and categorized. They learned all about ordering and receiving, serials and gifts, copy and original cataloging, budgeting and licensing, and even electronic resource management and discovery. Another theme I took away from this session that repeated throughout NASIG was the interpolarity of things. I say “things” to be intentionally broad about this term. Could there be a better word to use in describing the relationships between Access/Public and Technical/Collection Services Departments? I think not. Before this conference, I tended to think of the word interpolarity in the context of data – such as Linked Data and the relationships between items, their records, and their fields. I had also used the word when referring to systems—to describe how one platform related to another, where they intersected (perhaps at the discovery layer level), or where they had a common technological feature (as with single sign on authentication). But, after this conference, and following this session in particular, I have new context for this term as it relates to workflows and even interpersonal dynamics between the real-life individuals in a library. As for the argument of librarians taking sabbaticals, clearly I love the idea, and I thoroughly enjoyed hearing how positive the results of this opportunity were for Boise State librarians. However, there is still the academic structural norms of our organizations to consider. In what dreamy future world would our libraries permit librarians each take a sabbatical? Let us continue to ponder this thought.

**Full Text Coverage Ratios: A Simple Method of Article-Level Collections Analysis**

Presenters: Matthew Goddard, E-Resources Librarian at Iowa State University

I have to admit one of the reasons I elected to cover this session was not just the intriguing title, although I do genuinely love topics that involve the words “method” and “analysis,” so that was a part of it. However, the biggest reason was this speaker’s name: Goddard. I had been binge-watching Jean Luc Goddard’s films over the summer and could not resist when I saw the schedule included a presenter with the same last name as one of my favorite directors! But, I di-
gress…do not let the boring to many but excellent to me title fool you. The content of this session was top notch, and this speaker did a great job of making the information presented more interesting than you might at first imagine it could be. As with all great presentations—in my opinion, of course—he gave a specific outline of what the session would cover right away as well as a good intro to his own background, since he has recently changed institutions. The background was very important to his session talk and gave context everyone could relate to by presenting a very common problems that all academic librarians face:

A. Too many degree programs and students
B. Too few librarians
C. Unsatisfied faculty—particularly with serials holdings

Librarians, including the speaker, would repeatedly ask for a list of journals that faculty would like, but they rarely ever received any suggestions, so the cycle of discontent would continue. The speaker hypothesized that faculty really didn’t have a list. He attributed this to the faculty makeup being early career researchers or primarily teaching faculty, and that related to or resulting from this, the faculty largely had internalized the paradigm of information seeking where the article is all that matters. The larger awareness of the journals is overlooked and unimportant. This gets to the heart of what users of all types are looking for today from their libraries—it is what our age of Google and Amazon have programmed them to want—item (and, in this specific case, article) level results, NOT container (or journal) level. Of course, traditional library collection assessment looks at the container level and not the article level! Here is the issue with issues…“Journal-level analysis is increasingly divorced from user experience.”

Goddard shared a super simple metric (introduced about 7 minutes into the session) to evaluate the strength of holdings at the item level within a given subject area. Functional requirements to come up with for your own full-text coverage ratio include:

- A web-scale discovery service
- Full text filtering
- Student worker

The full text coverage ratio can also be expressed as a simple definition: \( \text{FTCR} = \frac{X}{Y} \)

"Given a search that approximately represents a given subject area, the FTCR is the ratio between the number of items that are available (X) and the number of items in the total set (Y)."

"Out of all possible relevant items (Y), our library holds (X) – therefore our full text coverage ratio for this domain is X/Y."

"Roughly X / Y % of all items published in this area are available to our users."

As I was listening to him speak and realized he had only been talking for about ten minutes at this point, I was astounded both at how practical this idea of the “Full Text Coverage Ratio” was and at how easy to understand he was making this. Right away, I was making notes in my steno pad as rapidly as I could about how I could translate the questions he proposed answering using this formula into my law library’s collection assessment. In the law library, we could determine how well we were covering copyright and intellectual property law versus business and corporations or insert any and all niche fields of legal scholarship in and determine our coverage!! He went on to speculate how this formula could assist in decisions about the impact of journal packages to the support for specialized faculty, and comparing the investment dollars we are putting as a library into one area or another. The steps were straightforward:

1. Formulate a search that approximates the body of scholarly output relevant to a particular academic program.
2. Define a discovery service search based on scope of interest.
3. Do a full-text limited search—note the total results. This is your X.
4. Do an “unlimited” search—note the total results. This is your Y.
The speaker went on to encourage you to compare ratios over time and to compare them to other similar institutions. Close to the 30-minute mark of this presentation, he began sharing the results for his particular institutions. The data is wonderful and very well visualized. He left a solid ten minutes at the end to allow for live questions and answers. It was not at all surprising from the comments and discussion that this session was useful to many, many librarians listening in and not just to myself. I cannot wait to give this formula a try. There is nothing more satisfying that applying data analysis in a super practical way to inform decision-making. This session could not have been more timely, too, as we are all under stricter budgets in the coming semester and perhaps for a year or several to come. The formulaic approach combines the user-centered lens that is gaining in popularity with the data-informed and technology-enabled modern librarian to re-frame how we think about and evaluate our collections, how we spend our money, and, ultimately, how we can best serve our communities.

**Walk this Way: Online Content Migration Experiences and Collaboration**

*Dana Deseck-Piazzon*

Librarians may feel that online content migrations initiated by publishers are orchestrated arbitrarily, without considering librarians and end users; however, the first presenter, Wiley, addressed upfront that publishers prepare for a migration by doing strategic planning. So, publisher decisions regarding timing and communications around migrations are often deliberate. Three participants of the NISO Content Platform Migration working group, Mathew Ragucci from Wiley; Xiaoyan Song of North Carolina State University; and Athena Hoepnner of the University of Central Florida; presented, “Walk this Way: Online Content Migration Experiences and Collaboration.” The program covered the migration experience from the publisher (Wiley) and librarian perspectives and then concluded with a discussion of the NISO Content Platform Migration working group.

Ragucci first presented Wiley’s platform migration experience with the Wiley Online Library content move to the flagship product Literatum. In 2010, Wiley developed the Wiley Online Library, a “homegrown” platform, to house content from two large online platforms (Wiley Interscience and Blackwell Synergy). The eight-year old WOL required a large amount of resources, effort, and staff to maintain, and a move to Literatum would provide more features, better functionality, and expanded content. Although any content migration involves managing data, the publisher perspective heavily emphasized the communication aspect. Since the WOL migration to Literatum was a hard cutover, meaning there would be no simultaneous hosting on both platforms, the Wiley team planned it very carefully.

In discussing the data exchange experience, the publisher perspective addressed the importance of URL redirects (and how they proved essential), but also mentioned that current redirects are not the “panacea that will solve everything.” And they communicated with vendor partners to ensure they had open URL parameters. Wiley kept the old WOL dashboard on “life support” for some time and later migrated usage data to the new platform to address libraries’ collection development needs.

Wiley employed several communication methods to facilitate the migration. These were a migration hub site, a global email campaign, a thorough technical FAQ, and a brief checklist of action items to take after the migration. After the migration, there was the looming and fundamental question of “Did we do it right?” To address this question, Wiley conducted a post-migration survey, and the results were most favorable.

Xioyan Song, at North Carolina State University, discussed her unit’s (monograph) approach to managing content migrations, from how they are first notified to addressing the impact. She sits in the monograph unit, and her team uses the
open-source application Trello to manage all migrations that directly impact the unit. When the team learns about a migration, they proactively evaluate the impact. Some of the questions they pose are:

- When is it happening?
- What resources will be impacted?
- Will the URLs be temporarily or permanently updated?
- What do we need to do?
- What actions need to be taken?

After these questions are addressed, the team takes applicable actions. It is important to determine if the URL will be updated temporarily or permanently. If it’s a temporary re-direct, MARC records must be updated. The most common actions that they take are:

- Update MARC records
- Communicate with vendors to update metadata and linking
- Update EZProxy
- Download usage
- Set up new administrative accounts
- Notify public services librarian about changes impacting users
- Coordinate with internal colleagues to update discovery systems and tools

Although most migrations are “smooth,” issues sometimes arise, such as not always receiving a migration notice. At times, it is a challenge to identify records in the ILS that do not come from KB, and some older content may not migrate correctly, which should be reported to the publisher. She addressed that sometimes migrations occur during peak usage and asks that publishers consider the busy times during the academic year. Of course, librarians wish that every migration is seamless and has minimal interruption to end-users.

Athena Hoeppnner, of the University of Central Florida, discussed the formation of the NISO Content Platform Migration (CPM) working group. The NISO Information Policy and Analysis Topic Committee sought ideas for a new working group, and Athena and Kim Steinle of Duke University Press proposed CPM. The group conducted an informal survey asking publishers, content platform vendors, and librarians about migration frequency. The NISO group work item was to develop a recommended practice to help standardize the process and provide recommendations to improve communications before, during, and after migrations. She stressed that a “recommended practice” is different than a standard because it provides ideas for how to do something well. Initially, the group investigated the “state of migrations” by conducting interviews, surveys, literature reviews, vendor communications, etc. They also reviewed related standards: TRANSFER Code of Practice, KBART/KBART Automation, DOI/Cross ref, Authentication, and Usage (COUNTER and SUSHI). The planned deliverables are: recommendations for publishers and vendors to ensure migration addresses librarians and end users needs; a communication plan; checklists for publishers, vendors, and librarians; and a glossary of key terms. The initial draft was due July 2020, but due to the pandemic, it has been delayed. After the initial draft is released, there will be an open comment period, and she encouraged everyone to review the draft and provide comments. Here is the link to the recording on YouTube: https://www.youtube.com/watch?v=TpTaQcjQjOW0&list=PLfCwmKIu_VYZsodxHZ66PJGkSZN4al&index=18&t=2277s.

**Web Accessibility in the Institutional Repository: Crafting User-Centered Submissions Policies**

“Web Accessibility in the Institutional Repository: Crafting User-Centered Submissions Policies” was presented by Margaret McLaughlin and Jenny Hoops from the University of Indiana. They began the presentation by explaining that the updated submission policy was initiated by a university accessibility initiative. Following the audit, they would report their findings to some administrators/deans and the user experience team. Therefore, the findings needed to present technical information but also be understandable to someone with limited technical experience. When institutional repositories were first created in the mid 2000s, accessibility was not the focus, so the levels of accessibility in IRs vary
across institutions. Interestingly, they pointed out that IRs have open access policies, which means that they are freely accessible for all and accessible by all (including those that need a screen reader).

In conducting the accessibility audit, the Scholarly Communication Department was asked to audit all websites, which included the public information site, internal wiki pages, journal publishing platforms, two open access repositories, a blog, a Wordpress site, and LibGuides created by the department. Scholarly Communications collaborated some with the user experience department (but their resources were already stretched thin). The team conducting the audit used mainly publicly available and open source tools, such as WAVE and FAE. The department addressed and categorized audit results according to short-term and long-term issues. The short-term issues were dealing with alt-text, empty links and labels, structuring webpages and metadata, and color and shading on pages. The long-term issue required addressing content in the institutional repository, IUScholarWorks, that was inaccessible. Initially, the focus of the open access IR was for the deposit of electronic articles, and there was no accessibility early on. To tackle the IR accessibility issues, the team conducted a “peer” assessment of other academic institutions’ IRs. Their main concern was ensuring that they could make sustainable changes to the IR while still making noticeable improvements in accessibility. In order to facilitate a discussion around accessibility, their department created an institutional accessibility policy spectrum, and when they started, there were no practices or guidelines. Their goal in updating the submission guide was to develop new submission guidelines that emphasize the importance of depositing accessible documents (and they would be recommendations).

IR Accessibility Policy Spectrum

<table>
<thead>
<tr>
<th>Library provides guidelines/to comply</th>
<th>Equal balance of labor</th>
<th>Implementing long-term sustainable solutions; completely library facilitated</th>
</tr>
</thead>
<tbody>
<tr>
<td>No practices or guidelines; user maintains responsibility</td>
<td>Library offers batch accessibility, edit services, some tech intervention</td>
<td></td>
</tr>
</tbody>
</table>

McLaughlin identified accessibility best practices to incorporate into the already existing submission guide. The best practices were: use headings/structural tags, add alternative text, and export from Word to PDF to preserve accessibility. The new accessibility guidelines were placed between step 2 (describe) and step 3 (upload) on the existing submission guide. It has been six months since the new submission guide was made public, and they determined that there have been much higher accessibility rates. Their next steps involve conducting a formal assessment of accessibility, remediation of back content, and making a plan to move to step three on the IRA Accessibility Spectrum.

Here is the link to the recording on YouTube [https://www.youtube.com/watch?v=pjJ7b9t1zBE&list=PLfCwmKIIu_VYZfsodxHZ66PJGkSZN4al&index=21](https://www.youtube.com/watch?v=pjJ7b9t1zBE&list=PLfCwmKIIu_VYZfsodxHZ66PJGkSZN4al&index=21)

**Program Report ALA Annual: Radically Rethinking Technical Services**

*Cate Kellett*

*Yale Law School*

*Lillian Goldman Library*

Tricia Bengel, Library Sales & Services Manager at Ingram Library Services

“Radically Rethinking Technical Services”

With the global pandemic, all libraries are in the midst of unprecedented change. There are budget shortfalls, increases in e-content use, new curbside or hands-free delivery services, and more browsing through the discovery layer now that physical spaces are closed. In this program, Tricia Bengel revealed a list of ten opportunities libraries can explore to rethink their services to save staff time and money while serving their patrons.
10. **Physical vs. Online Browsing.** Popularity of online browsing over physical browsing may continue even after libraries reopen their buildings to patrons. It’s crucial to run reports on how users are choosing their materials for checkout. Run those reports over time to see how patron behavior evolves.

9. **Types of searches in the OPAC/discovery layer.** If patrons are no longer physically browsing the shelves, you may want to rethink displays and other signage, spending time instead on e-browsing support. This involves running typical searches and seeing what kind of results appear. Then adapting our tools to better support those kinds of searches.

8. **Optimize discovery layer relevancy ranking.** Find out if you have control over the relevance ranking so you can change indexing rules, if necessary, to better suit patron needs.

7. **Is elaborate processing worth the cost?** If you expect to weed out materials after only a year or two, they may not need special processing to protect their condition. Some libraries may not need to add spine labels on popular materials if they never end up in the stacks and instead go straight from the holds shelf to the discard pile. Evaluate whether label protectors are truly needed. Would it save more to simply fix problem labels as they arise? Run the numbers to see if it would be cheaper to replace a paperback book if it deteriorates compared to the extra money spent on laminated covers or other protective processing.

6. **Do you use your analytics?** You don’t have to subscribe to an analytics tool to analyze your data. Utilize whatever tools you have, such as running reports straight from your ILS, to look at patron patterns. This is especially important with “invisible patrons” who never interact with the library staff but only use online products like Overdrive, for example.

5. **Have you changed your shelving?** It’s always been important to change where and how your books are arranged for browsing. Now that may be even more important. If social distancing remains the norm, you may need to change the layout of your space for those who do come in to ensure there is room for patrons to spread out.

4. **Do you weed aggressively enough?** We need to weed more print books in light of our increasing electronic collections. Most importantly, make weeding regular in both print and electronic formats. Use a weeding tool if you can.

3. **Do you have centralized collection development?** She suggests making decisions based on the library’s needs as a whole. Use empirical evidence like usage statistics. Collection development and weeding should work together to analyze which kinds of materials circulate and thus decide what to purchase and what to purge. It’s important to make collection development decisions based on patron needs, not based on avoiding hurting a librarian’s feelings.

2. **Who’s afraid of PDA?** If you have a lot of materials that do not circulate, you should rethink Patron-Driven Acquisitions. There are tools available to assist with PDA. You can avoid the horror stories we’ve all heard about with PDA budgets maxing out too quickly.

1. **Are you and your staff searching in your discovery layer?** Catalogers should know how the discovery layer works and how their metadata is used in real time. Priorities may then shift to include work that better supports the way their patrons see and use their catalog.

To conclude her program, Bengel encouraged all libraries to use quantitative data to analyze various aspects of their collections with an eye toward meeting the needs of their particular user groups. This is more important than ever with the dramatic changes brought on by the global pandemic.
What Is in a Title?: The Issues of Title, MARC, Indicators, and Getting the Direction for Sinopia

We ask ourselves, ‘what is a title?’

That question may look easy or difficult, depending on the situation. But then ponder the question in RDA: title, title proper (huh?), variant title, etc. Think about these as applied to MARC in 246 and indicators that denote which ‘type’ of title is being recorded in which tag (it’s a good thing the 246 is a repeatable tag). And we have not even mentioned ‘subtitle.’ The point is that there has been a relatively significant amount of time given by catalogers to record a ‘title’ in-hand. In this column, I want to think about the title as applied to BIBFRAME as implemented in Sinopia and some challenges we already see for recording such an element.

Let’s get started.

TITLE IN BIBFRAME.

To add better context to this column, let me briefly talk about what the ‘title’ is in BIBFRAME, as compared to MARC, as well as how we have relied so heavily upon MARC-centric features in our ‘historic’ cataloging practices.

To begin, the ‘title’ (see https://id.loc.gov/ontologies/bibframe.html#c_Title), or as named in the BIBFRAME ontology, the ‘Title,’ or ‘SubClassed As: VariantTitle,’ is not a text string encoded in a ‘field’ as it is in MARC. It is actually an entity in itself—and installed in the metadata editor as a template in a profile, ideally, we think, dedicated to a general type of resource in the same way that OCLC’s Connexion uses general Workbook templates for different types of materials being described (these types of ‘ideals’ are still in development and are related as much to workflow as they are to UX design). In the BF case, the ‘Title’ is an entity among an all-different-than-MARC-situ referred to as Entity Based Description that emphasizes relationships between entities rather than data in a ‘record’ for a resource being described. These relationships are connected via the inclusion of URIs—but specifically as RDF in a knowledge graph that contains the technical nature of these relationships being used to describe a resource. One should not be too new to this as RDA has also been attempting to describe relationships between, say, the Work, or the Creator, or the like.

Let me present an example of the entities in relationship before we move onward to this difference from a MARC based schema for ‘Title.’

Logging into Sinopia, LD4P’s BIBFRAME editor, I do a search for our institutional profiles. In this case, I will locate the Work and the Instance. There are plenty of other steps I could detail in the search, how the profiles are actually listed, etc., in the editor, but I will keep our focus on the ‘Title’ itself.

The two tabs within the editor display the two templates we will examine. One thing to make clear, the Work and the Instance are BIBFRAME defined elements in its ontology. They are not the same thing as the Work, Expression, or Manifestation as defined in the LRM (Library Reference Model) and what that absorbed from FRBR (Functional Requirements for Bibliographic Records). The model in BIBFRAME is its own schema, and RDA will need to be implemented in unique ways therein (but that makes for a WHOLE other essay someday). [Editor’s note: See picture on next page.]
Title is required information, as denoted by the asterisk. It should be. Even the briefest of descriptions for a resource should contain the title. Each element in this template specifically designed for Title information is a free-text field, wherein the cataloger enters the strings according to the resource in hand (this sounds simple, but, later in this column, I will expose an assumption in that apparent simplicity).

I will quickly add some information into these Title fields so we can view the RDF (in this case, in N-Triples). I have added some content as if I am cataloging the Description & Entry column for TSLL.

One can see the strings ‘TSLL column,’ ‘description & entry,’ and ‘description and entry’ among the triples. Note one thing: the label for ‘description and entry’ says this is a Variant title, but codes in Sinopia as a bibframe/partName. Not a big deal in itself, but this reveals the nuances that we have come to expect in MARC that do not seem so obviously manageable within BIBFRAME yet. In part, we realize the granularity in MARC simply does not exist in BIBFRAME. More on this later. I will now save this so we can create a MDS (Metadata Description Set) and give a URI to the set. In other words, we have created an entity called Work (which is really just a Title at this point) that is usable and reusable on its own (rather than being a text string in a ‘record’ containing mostly other text strings (controlled and URIs present notwithstanding).

We now have minted a URI for the Work (https://trellis.stage.sinopia.io/repository/chicago/275b9516-c78f-405c-a69c-f2dab0b9f1db).
I am keeping this simple for the sake of the column; I could also go all out on ‘Creators,’ ‘Contributors,’ etc., but we want to focus on the Title in this column. Once that URI is minted, we know that the entity of the Work has been created—and we can use that entity to create a relationship to another entity called ‘Title,’ this one from the Instance.

For BIBFRAME, the Instance is most closely aligned to the Manifestation from the LRM—but not completely. It marks the ‘physical-like’ attributes of the carrier, be it electronic, or analog, or in whatever format. The current iteration of the Sinopia Instance includes the data for ‘rdamedia’ and ‘rdacarrier.’ ‘rdacontent’ is in the BIBFRAME Work because the Work is implemented in BIBFRAME differently than in the LRM (Work/Expression/Manifestation/Item).

![Instance Title](image)

These fields are also free-text entries. In this case, the Instance Title will be the same as the Work Title. Variations would come about if the published/manufactured/produced item contains variant Titles we would enter as strings representing something evident in the ‘object’ that is not clear in the more abstract Work (which is, in BIBFRAME, really a representative expression :)) ([http://www.rda-rsc.org/sites/all/files/Representative%20expressions.pdf](http://www.rda-rsc.org/sites/all/files/Representative%20expressions.pdf)).

https://trellis.stage.sinopia.io/repository/chicago/a38489ec-22ca-4efb-9d45-17609b875eb4

Once the Instance has the minted URI, we have created two entities with title information.

(Instance) https://trellis.stage.sinopia.io/repository/chicago/a38489ec-22ca-4efb-9d45-17609b875eb4 AND
(Work) https://trellis.stage.sinopia.io/repository/chicago/275b9516-c78f-405c-a69c-f2dab09f1fd

The question arises: okay, we have a Work and an Instance in BIBFRAME, but what is next? Well, we need to link these entities according to the proper relationship. In this case, as in RDA, there is a relationship and an inverse relationship.

In each saved MDS is a data point and label defining that relationship (which is also a triple).

In the **Work** (we will enter the URI for the **Instance**—please note the language of relationship):
In the **Instance** (we will enter the URI for the **Work**—please note the language of relationship):

![Image of Instance of Work]

**RESAVE** (and we have now two entities created and linked via URI in the correct relationship/inverse relationship). What we have done is create a very brief example of BIBFRAME Work and BIBFRAME Instance for the title, ‘TSLL Column,’ two entities that are now connected via URI in a relationship between those two entities. This is what is meant, in this example, as entity-based-description.

Next, we make note of the absolute difference in the MARC environment.

**TITLE IN MARC**

Note the density of information in a textual form—certainly one of MARC’s strengths. Also, note the two tags we associate with title, or title-proper for this poetry collection, in tags 245 and ‘alt-title’ or ‘variant-title’ in tag 246.

The relationship of the MDS (record) to the manifestation in hand is very different from the entity-based-descriptions we find in BIBFRAME. Often, we catalogue these manifestations without generating a name/title NAR for the authority file (which perhaps we should be doing for everything) (or maybe using a macro to produce something that could suffice to hold that spot in the bibliographic universe…). This simply means that we don’t often have Work from which to organize expressions and manifestations. In addition (I say this notwithstanding the incomplete LRM implemented in BIBFRAME):

Re: MARC Tag 245, something else is evident in this clarity of what the nature of the ‘string’ is to the field. What I mean is that even though the intention of the numbers in the second indicator may be for filing purposes, we can also surmise that the technical language for the title does not begin at the first characters in the string. In other words, we use those non-filing characters, as defined in the Tag 245 MARC21 standards on the LoC site ([https://www.loc.gov/marc/bibliographic/bd245.html](https://www.loc.gov/marc/bibliographic/bd245.html)), to enable left-anchored searching without making use of the definite or indefinite articles denoted by ‘The’ or ‘A’ (etc. in English language cataloguing)—we ALSO make use of those indicator numerals to denote the separation of RDA cataloging standards (representing what is actually on the resource-in-hand) from more important terms in the title OTHER than the aforementioned articles. It seems simple—but there are philosophical and technical reasons at play in this.

Re: MARC Tag 246, the meaning of indicators changes completely—herein, we start to think about what that alt or variant-title represents relative to the title proper in the 245. According to the MARC Tag 246 standards defined at the LoC site ([https://www.loc.gov/marc/bibliographic/bd246.html](https://www.loc.gov/marc/bibliographic/bd246.html)), we can use indicators to distinguish the sources from which a title variation may originate—even to the point of adding a variation because of cataloger’s judgment. I am not trying to rehash MARC standards here…I write ALL this because I really want to get to the final point, the issue of moving into a schema that does not favour, at least as of August 2020, marking that kind of specificity for the characters in the string, filing or non, and the real possibilities for variations of title information.
And in 246, we have an entire list of ‘types of titles’ as represented by the second indicator:

# - No type specified
0 - Portion of title
1 - Parallel title
2 - Distinctive title
3 - Other title
4 - Cover title
5 - Added title page title
6 - Caption title
7 - Running title
8 - Spine title

So, in 245 and 246 in MARC, there are standards and code structure for filing and non-filing characters in title and title -proper, as well as a LOT of coded meanings for the original source of a variant-title. In fact, that code even leaves room for simple cataloger’s judgment. BIBFRAME contains no such coded values yet.

ENTRY ISSUES IN SINOPIA

Recently, I attended a LD4P Sinopia meeting. In that meeting, someone brought out an ongoing question we have had about granularity of title information and whether one should add a title without articles as mentioned above, such as ‘The’ or ‘A’ to the BIBFRAME Work and the title with these articles in the Instance, as a way of correctly recording information, according to RDA, for the resource at hand. No decisions were made—but this will be an ongoing issue as we understand the nature of searching for resources and how those data points are indexed in any one system (which is really what left-anchoring and the filing/non-filing characters issue is about).

With the variant-title, there is ample opportunity in Sinopia to add and repeat as many variant-titles as one decides, according to best practices or cataloger’s judgment. BF provides: VariantTitle and ParallelTitle (and, of course, InstanceTitle)—these will be the most commonly used title templates. Notes can be added to each title keyed—but this is datatype: literal. There are no coded modes of distinguishing between the source for any variant or alt-title added to the MDS. So we cannot block out one type of variant title from another in the current iteration of Sinopia. I do not mean to say that this will be the case into the future. MARC, decades old, is still being developed ever so slightly, even recently. But, in MARC, we use a combination of filing/non-filing characters-via-indicators in 245 and numbers in the second indicator to distinguish some difference for the source of a variant title. History is being made right now in BF and Sinopia land, and no clear cut decision or coding exists for such distinction yet.

For many employers doing more work in this area and watching the community develop standards and practices around the BF ontology as well as PCC related decisions and training for Sinopia work. One can see, despite the narrow focus in this column on title and variant title, the distinctions between MARC and BIBFRAME. Some look at this and adopt a pessimistic attitude (as noted in my BIBFRAME 2020 survey data discussed in my Virtual Summit report update). But, history is messy as we live in it,—and that is what is happening now (even at the title level). :)

Want to discuss or inquire? Send me an e-mail: lambertson@uchicago.edu.
Work Records in Uncertain Times: How to Keep a Current, Up-to-date Copy of Your Work Email at the Ready on an Ongoing Basis

Wilhelmina Randtke
Florida Academic Library Services Cooperative

Introduction

Coronavirus has led to lowered budgets and furloughs for many employers. In light of this, here is a basic toolkit to keep and maintain a comprehensive copy of your work email at the ready on your own hard drive. In the event of job loss or interruption, this can be useful for pulling writing samples, keeping professional contacts and records of professional service which can come along through different jobs, and having access to workflows, presentations, scripts, etc., later.

In light of the usefulness, here are instructions on how to keep an up-to-date copy of your work email on your own hard drive. This assumes that you will Google for tutorials on each step, but it gives the broad steps for getting and maintaining a comprehensive copy of your work email, including broad steps for troubleshooting common issues.

Regardless of whether you work through these and make a copy of email, the idea of organizing and making a personal copy of important work documents (presentations, writing samples, workflows) has value on an ongoing basis and is something everyone should do on a regular schedule.

Preliminary: Permission to grab a copy of your email

First, think back to any policies you had to read and sign on hire or along the way. If you are forbidden from comprehensively downloading your email, then don't do it. Instead, think what you might use an email archive for, and try to keep a diary with similar information, then find how to get personal copies of important documents you might want later. For example, you might pull copies of significant items to use as writing samples or keep an address book and notes with professional contacts and committee appointments. Keep it on your own hard drive, and update it on a regular schedule, for example, annually or quarterly. Even with an employer policy preventing you keeping copies, if you proactively know what you might use later, then you can get it within policies. When I was with state government, my employer had a policy prohibiting making electronic copies of anything, so I made a public records request for some specific memos I had written with the memos attached, and that let me have writing samples formatted neatly and professionally (print outs weren't restricted by policy, but a scanned document is clunky compared to the original).

If your job never had you read or sign a policy regarding getting copies of records, then think whether you handle confidential information. If you teach, then you may handle FERPA protected information. If you do client work, then you may have privileged information. Anytime you keep a copy of confidential information, you take some liability along with it, and that's a personal consideration. Your employer should provide policies and basic training on confidential information that you might handle, but even if they don't, that's your liability, too, so think whether you have handled confidential information before. If you tend to handle confidential information and do not have a habit of sorting or flagging it in some way, like keeping client information in separate folders within email, then that can be a big reason not to keep a comprehensive personal copy of work records.

Having a full record of email is great as a just-in-case, but if you have liability either through an HR policy or through having handled confidential information, then it's likely best to imagine what you might use records for and make an alternative plan to get your own copies organized to meet that need. And actually, for everyone, periodically identifying and organizing the important documents from work, such as presentations, or instructions, or workflows, has a lot of value. If you want email access to be able to pull copies of frequent guest lectures, then proactively organizing those might be a better value than pulling everything and organizing it later would be.
If you are all clear to get a comprehensive copy of your email, then here’s how to get that.

**Step 1: Connecting Thunderbird to email.**

Thunderbird is an open source email client. It has pretty good search functionality, so it’s good for grabbing a comprehensive copy of an email account and for locating specific items later. The .pst export from Outlook is a more popular option for making a personal copy of email and is fine to do as well. The major advantage of Thunderbird over a .pst export from Outlook is that you can update Thunderbird daily or as often as you like with minimal extra effort. To make a comprehensive .pst export of email can be several hours or even more than a day, especially if you have worked somewhere a long time and have lots of email or larger attachments.

When you download and install Thunderbird, you can set it up to connect to an existing email account. Find whether your email is in a POP versus IMAP server (IMAP is more prevalent at this time), and then enter the connection information into Thunderbird. What you need is server name (ex. outlook.office365.com), username (likely the part before the @ on your email address or your full email address), and port number (for a Windows server you are likely using IMAP through port 993). This information is usually available from your employer as part of posted instructions for setting up Outlook. If you use the desktop Outlook client, then in your desktop Outlook client, you can look under "File" > "Account Settings" > "Server Settings" and pull the information from there.

Many tutorials are available by Googling regarding this initial process of connecting Thunderbird to your employer’s email server.

Once you have connected Thunderbird to your email account, you should see your email Inbox begin to populate in Thunderbird. And that’s it. Nothing else will populate automatically at initial set up.

**Step 2: Getting all your folders, not just your inbox**

If you use folders to sort your email, Thunderbird will not by default automatically detect and bring in your folders. On a first connection, you will only get your Inbox.

If your employer has a POP email server (less common), then moving these folders in is labor intensive, and syncing your email folders later is more complicated (takes some manual intervention for each folder; see [https://support.mozilla.org/en-US/questions/1140059](https://support.mozilla.org/en-US/questions/1140059)).

If your employer is using IMAP, then you can automatically pull in the folders. In Thunderbird, click on the name of your account (this name appears on the left-hand column over the list of email folders), then click to "Account" > "View settings for this account" > "Synchronization and Storage" > "Message Synchronization" > "Advanced." The setting under "Message Synchronization" sets whether or not your email will automatically sync, with the email server. You want it to sync in order to easily update a copy. In the "Message Synchronization" > "Advanced" settings, you will have checkboxes for syncing each folder. If you don't handle confidential or privileged information, then you may want all boxes checked to synchronize and regularly update all folders. If you do handle confidential or privileged information and have separated it out by folder, then this can be a good way not to get that information; never check the box to sync, and never create the folder within Thunderbird.

This same area also has the settings for whether email will be downloaded and saved on your hard drive versus pulled up as needed. To verify that you are saving email on your computer, disconnect from the internet, then search and browse email. If you see things are amiss, reconnect to email and read through the "Message Synchronization" settings.

**Step 3: Updating and comprehensively synchronizing the email stored in Thunderbird**

These instructions are for an IMAP server. Something really important about syncing email in Thunderbird is that the email will only sync when you open and run Thunderbird and when you have clicked to that folder within Thunder-
bird. Once you have created the folders within Thunderbird and clicked to each to do an initial sync of email, you have a snapshot of email on the date of setup. When you start Thunderbird up later, you will be on your Inbox by default, and only your Inbox will synchronize. To comprehensively synchronize later, you need to click through every email folder. To do this, use the interface in Thunderbird to accordion out any folders and see subfolders, select a folder at the top of the list, then click the down arrow over and over again until you are at the bottom of the list. When new emails are found within a folder, Thunderbird should show a message count for that folder in blue, and when the email has been downloaded, it should show that message count in black.

**Step 4: What to do if your employer uses email archiving (separate area for recent vs older emails)**

An email server can be set to automatically archive emails older than a certain age, for example, older than one year. The reason for this is to allow faster recovery of newer emails. By default, any users logging on to email will see only their more recent email but can go to the archive area to search and retrieve older emails.

If your employer has an email archiving policy, then when you connect Thunderbird to your email account, it will only connect to the more recent email. To get to the archive area, you would have to put in the same connection information but also put a path on the server to the folder with the archive. In previous versions of Thunderbird, it was possible to make two accounts and connect one to current email and one to the archive. In the current version, you have to pick one or the other—your current versus your older email, since Thunderbird will only allow you to connect once with one group of settings to a specific server using a specific username.

So, the problem you have to get around is that you can easily grab and routinely sync your more recent email, but your older email is aging off, and you need a different way to capture the older email.

Here's how to get both recent and older emails together in one place.

Thunderbird is able to import and display a .pst file. The .pst file is a multi-email export from Outlook. To comprehensively get your older email alongside your newer, you need to make two .pst files. In Outlook, first comprehensively (Inbox, sent, and all desired folders) export your newer email to .pst. Next, comprehensively (Inbox, sent, and all desired folders) export your online archive area to .pst. Getting them in this order means there will be some overlap, but no gap. That's important because time for Outlook to export the .pst can be several hours long or even a full day. And, getting your more recent email in .pst means that you won't have emails aging off in Thunderbird, so this lets you avoid a gap emerging as Thunderbird syncs and removes older emails from the Inbox and folders according to your employer's archiving policy. Now, import both .pst files into Thunderbird.

**Step 5: Sync on a schedule**

Remember how you had to open Thunderbird, then click through each folder in order to sync up the contents of each folder. Pick how often you want to do that, and do it. Also, consider periodically turning off internet on your computer, then looking through email, in order to ensure that things are set up and working in the way that you think they are.

**Extra: Moving your Thunderbird email to another computer, or backing up outside of Thunderbird**

To make a copy of your Thunderbird email, open Thunderbird, select your account (the name of your account appears on the left hand side over your list of email folders), then go to "Server Settings" > "Message Storage" > "Local Directory." This "Local Directory" setting has the location of where your email is stored on your own computer. The emails you have downloaded with Thunderbird are all stored in a folder called "Profiles" on your computer. Grab the contents of the "Profiles" directory, make a copy, and that's your email. You can install Thunderbird on another computer, check the "Local Directory" setting on the new install of Thunderbird, then put a copy of your "Profiles" information there, and get into the email on the new computer.

You also can export from Thunderbird, including exporting your messages to .msg format which can be read using any text editor.
Agility is Not Just for Yogis

Even before COVID-19 turned the world upside-down, Harvard Medical School Psychologist Susan David argued that we should work on developing emotional agility to cope with the increased pace and complexity of modern life.¹ David says that improving our emotional agility will help us more gracefully navigate life’s ups and downs with self-acceptance, clear-sightedness, and an open mind. We can achieve emotional agility at work by making room for all our emotions, rather than labelling some as ‘good’ (or appropriate for work) and some as ‘bad’ (or inappropriate for work). Being emotionally agile means being mindful and flexible with our thoughts and feelings, and this agility will help us respond optimally in stressful situations.²

According to David, numerous studies show that emotional agility can help people alleviate stress, reduce errors, become more innovative, and improve job performance.³ As the ongoing COVID-19 crisis causes incredible workplace stress and intense emotions, managers may want to consider encouraging and developing emotional agility in their team as well as in themselves.

A key part of emotional agility is viewing emotions as data, rather than as a directive.⁴ You can more methodically examine your emotion if you try to dispassionately consider the function of the emotion, or what your feeling is trying to tell you. Exploring the issues surrounding the root cause will then help you find ways to manage the emotion and lessen the grip it has on you. For instance, consider a staff member who is angry about having to come back into the library—she thinks all university classes and services should be remote. If her anger is coming across at work, you might ask to speak with her and address her emotions. You verify she is angry and ask her to consider what the anger is trying to tell her. Let’s say, like 99.99% of us, she is afraid of being exposed to the virus, so the root cause of her anger is actually fear. You could then acknowledge her fear and talk about means to reduce that fear: Does she need more PPE? What kind? Could you help her put together a mental checklist for certain situations (aka I’ll do A,B, and C when I leave my office for the copy machine/restroom/elevator and X,Y, and Z when I get back to my office)?

Another aspect of emotional agility is the ability to consider strong emotions in the context of your values.⁵ David offers this example: let’s say you need to give some difficult feedback to one of your team members, and you keep putting it off because you’re anxious (which, helpfully, causes you to become even more anxious). In examining your emotions, you realize your core value of fairness is partly behind this procrastination. Overall, your team member is an excellent and valuable employee, and you don’t want to be unfair to him. But consider what will bring you closer to your value of fairness: having or not having the difficult conversation. You might conclude that giving him the feedback, which in turn will help him improve his performance, is actually more fair to him—and to your whole staff—than being a prisoner to your anxiety and avoiding the difficult conversation.


Endnotes
2. Ibid, 6.
OCLC has made several enhancements to its automated Duplicate Detection and Resolution (DDR) matching algorithm:

- Rare materials published to 1829 are now excluded from DDR.
- 1XX and 7XX will now be taken into consideration to prevent bad merges for serials with generic titles.
- Matching will be more strict for different places of publication with identical names but in different jurisdictions.
- Matching will be more strict for corporate bodies with subordinate units.

For more details, see the August 2020 WorldCat Matching release notes on the OCLC website.

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Disaster Planning in a Year of Disasters

Happy fall semester, everyone! Do you know where your disaster plan is? Do you know if it is up to date? Does it include an infectious disease section? An active shooter section? A severe weather section? A continuity of operations plan? Live, from the Gulf Coast, it’s hurricane season during a pandemic!

I’ve learned a lot about disaster planning and response during my career. As some of you know, the first day of my first ever job in a rare book room involved learning how to clean up and dry books after the HVAC rained inside the vault (yes, you read that correctly). Lessons on how to spot mold, how to treat mold, and how to document that you found and treated mold quickly followed. Since moving to Houston, I’ve learned not only how to prepare libraries for hurricanes, but also how to develop a plan for the home. I never really thought that I needed a home disaster plan other than what to do in case of fire or tornado, but hurricanes and rising floodwaters have a way of making you see the error of your ways. I’ve been to multiple workshops, seminars, conferences, and webinars on disaster planning. I’ve presented on the topic a few times. This year, I changed things up by helping plan and organize a symposium on emergency and disaster management with two colleagues. It seems that after more than a decade of dealing with disasters, I’ve become a bit of an expert on it (cue the imposter syndrome).

So, how do you prepare for disaster in a year that is a disaster? You are all well on your way, whether you know it or not. You all know how to deal with a pandemic and how to operate off-site. This means you already have an infectious disease plan and a continuity of operations plan (COOP); they just may not be articulated as such. All the policies and procedures your institution, department, and/or office have put in place regarding COVID-19, such as when to close your building, how to work from home, and how to return to work safely, constitutes your infectious disease plan. If you haven’t written it out yet, I recommend using the CDC’s 2017 Pandemic Flu Update as a template – that’s what we used at South Texas. Your continuity of operations plan contains all your policies and procedures for operating off-site, with a list of staff responsibilities along with contact information. Write down how you’ve been operating for the last six months, and you have your COOP. If you need a starting point for the rest of your plan, I recommend the one that Robin Schard, Associate Director of the University of Miami Law School, shared with the attendees of the above mentioned emergency planning symposium I hosted.

Those of us along the coasts also have to deal with hurricane season. We are approaching the end of August, which is when the Gulf of Mexico gets active. We’re on our 12th named storm of the year in the Atlantic in a season where they’re expecting 20 named storms. Tropical disturbances 13 and 14 have already formed and are on current trajectories...
that will potentially bring both of them into the Gulf as hurricanes at the same time. Fun fact: many of the items people buy in preparation for hurricane season are also the items people have been stockpiling over the course of the pandemic, cleaning supplies and toilet paper in particular. For most institutions, property services or facility management departments take care of all the cleaning supplies. However, because it is more difficult for everyone to find these needed supplies, you may want to double check the procedures for accessing them, as it may have changed.

There are other, more challenging shortages to deal with for home preparation. Bottled water is back on the shelf, which is something everyone should have in case of emergency. Hurricanes, earthquakes, derechos, blizzards, flooding, water main breaks – there are many reasons to have bottled water in your home “just in case.” However, canned goods, dry pasta, premade pasta sauce, fruit cups, canned meat, peanut butter, yeast, and flour are all things that people buy as hurricane prep that have been in short supply in recent months. I’m not saying that all those apocalyptic preppers on YouTube are on to something, but… maybe they’re on to something. You don’t have to turn your garage or spare room into a stockpiling facility, but it’s not a bad idea to have a few weeks’ worth of food in your house all the time. We all like fresh fruit and veggies, but unless you have a prolific home garden, you should buy a few canned vegetables as well. As we all know from the run on stores in March, panic isn’t rational. Supply chains haven’t recovered yet, so there are still items you can’t find in stores.

When I talk about disasters, I default to hurricanes because I live in the Houston area, and that’s what we’re most likely to have to deal with. I freely admit that I have no idea what to do in the event of a wild fire, like the ones currentlyraging in California. I think the only plan for that is to make sure all your important documents are in one, easy to carry container so you can grab them and run. This is the same advice we give to those in flood prone areas. This year, though, you have to make sure that your grab-and-go-box includes face masks. My disaster plan isn’t going to look exactly like yours. You know your area, what natural disasters it’s prone to, and you know best how to prepare for them. It is more likely, however, that our disasters will come in the form of a leak, broken pipe, mold, or pest invasion. It’s easy to focus on the more dramatic emergencies (*cough* pandemic *cough*) because they are more, well, dramatic. But it’s the everyday ones that cause us the most problems. Having a plan, being prepared, knowing what to do regardless of the size or scope of your emergency, brings a priceless peace of mind. In a year that is the very definition of disaster, peace of mind is something we all need.

Endnotes

3. Robin was the last presenter of the day, and she walked attendees through how to create their own disaster plan. Her template is available both as a word document and a PDF on the symposium website listed in endnote 1 above.
tom line is that we are all dealing with transition and the evolving “new normal,” and it is no surprise that this may not present an ideal environment for thoughtful reflection, research, and writing. But, you know what? That is okay! There are bound to be times in our professional lives that demand action, responding, and doing. This is definitely one of those times, and rather than berate myself for not having the bandwidth to focus on research and publication, I am focusing on the fact that all of the action, responding, and doing that I am accomplishing now will provide rich fodder for writing when I am a bit more on the other side of it. I hope that realization gives you as much comfort as it does me. This is such a unique time, and just by navigating it today, we are laying the groundwork for new and innovative articles, chapters, and conference programs that we can share with our colleagues tomorrow.

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Funding Research Opportunities Grant (FROG) Announcement

Hop to it!!
Please see the following research opportunity, and don’t forget the FROG! It’s quick, it’s easy, and your research will benefit your Technical Services colleagues.

The AALL LSRD-SIS and TS-SIS FROG (Funding Research Opportunities Grant) Committee is always accepting applications from any AALL member.

The FROG provides support for law librarians to perform research or assessment projects which will enhance our profession. FROG applicants must be members of AALL and must show evidence that their research will benefit technical services law librarianship. The LSRD/TS FROG Committee will award up to $1,000 in grants in a single year.

“AALL’s Strategic Plan envisions that AALL and its members will be the recognized authority in all aspects of legal information. AALL’s Research Agenda (https://www.aallnet.org/education-training/grants/research-grants/research-agenda/) seeks to make that vision a reality by stimulating a diverse range of scholarship related to and supportive of the profession of law librarianship.” -- AALL Research Agenda 2013-2016.

For other research topic ideas, visit the FROG website (https://www.aallnet.org/lsrdsis/awards-grants/#past) and AALL’s Research Agenda page (https://www.aallnet.org/education-training/grants/research-grants/research-agenda/).

For more information on the grant and the application process, visit the Grant Guidelines (https://www.aallnet.org/lsrdsis/awards-grants/).

If you have any further questions, please email the FROG Committee Chair, Jessie Tam, at jessie.tam@mdcourts.gov.

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SERIALS TITLES

Joy Humphrey
Pepperdine University

The following is a list of serials title changes:

Chicana/o-Latina/o Law Review
(OCoLC 24476726)

Changed to:

Chicanx-Latinx Law Review
v. 36 (2019)-
(OCoLC 24476726)

UC Davis Journal of Juvenile Law and Policy
(OCoLC 35959393)

Changed to:

UC Davis Social Justice Law Review
v. 24 (2020)-
(OCoLC for online format 1156470853)

The following is a list of serials cessations:

American Maritime Cases
Ceased with: v. 2019
(OCoLC 3737842)
A significant number of new subject headings have appeared in the last quarter, so we will have to postpone our consideration of “Imaginary submarines” and “Lipsyncing.”

New headings in the area of law and politics are numerous. “Baselines (Maritime law)” has changed to “Baselines (Law of the sea),” “Chronic traumatic encephalopathy” (as in American football, among others) is available. “Mediation (Roman law),” “Zakat (Islamic law)” and “Cyberspace operations (International law)” appeared, and the heading “Affirmative action programs” has had information added. The heading “Basic needs” has had information added to it, as has “Social rights,” “Economic rights” has been added. “Program trading (Securities)--Law and legislation,” “Racism in schools,” “Transphobia in schools,” “Refugee camps--Law and legislation,” and “Refugees--Health and hygiene--Law and legislation” were added. “Discrimination in mass media” sounds like a useful heading. In the area of evidence, we now may use “Fecal DNA.” The “Unite the Right Rally, Charlottesville, Va., 2017,” where President Trump discovered “many fine people,” is available for use.

Other interesting headings in this area include “Capitalist realism (Economic theory)” (see the scope note), “Ethnic accommodation” (again, see scope note), and “Green New Deal.” Also added is the interesting heading “Image-based sexual abuse,” which again needs to be read before use. In the area of law enforcement, we have “Intelligence-led policing” and “Male murderers.” We also have “Political crimes and offenses--Law and legislation,” one which will hopefully be used more for foreign than domestic law. A much-discussed problem is “Foreign interference in elections” as well as "Racism in public administration.” Of course, we should all avoid being a “Public nuisance” (it is a tort, and thus will not take “Law and legislation”). Subject headings in the area of indigenous rights have been improved with the approval of “Free, prior, and informed consent (Indigenous rights).” More generally, we have “Public lands--Recreational use--Climatic factors.”

We have several new headings for classes of persons. “Humanitarian aid workers” may be used, as may “Independent scholars” and “Liaison librarians.” “Minority activists” and “Minority women activists” were approved, as were “Indian elders (Indigenous leaders)” and “Indian women elders (Indigenous leaders).” A less frequently used term, perhaps, is “Métis elders (Indigenous leaders).” A number of new terms for sexual minority youth were established. A useful pattern for these are the two terms “African American sexual minority students” and “African American sexual minority youth.” Groups to take this pattern include Alaskan native, Asian American, Hispanic American, Pacific Islander American, and Indian (as in Native American; “Indian sexual minority students”). “Sexual minority immigrants” may now be used.

There are a few other interesting headings. “Family violence on television” is one, and “Strong black woman stereotype” is another. “Ostracism (Psychology)” has extensive notes that should be read. “Dissenters in popular culture,” “Minority women in mass media,” “Men, White, in mass media,” and “Marginality, Social, on television” round out this list.
The OBS/TS Summit 2020 & Linked Data in Libraries Conference

The first ever summit of our two special interest sections produced several excellent sessions:

Facilitating Open Knowledge: The Intersection of Wikidata and Libraries: Presenters shared how "inter-collectional connections broaden the experience to go into parallel and related items." What a fantastic summary of Linked Data, and Wikidata in particular. Many slides, available at http://hdl.handle.net/1805/23387, gave specific examples of using Wikidata for legal faculty scholarship. It was noted in the session and from commenters in the Q&A that "we’re in the wild west days of Wikidata (just like Wikipedia used to be - it is very community based)." When considering Wikidata, remember that most things in Wikipedia are in Wikidata, but it is not always true the other way around. The discussion following the presentation focused heavily on "notability." Presenters made sure to comment that Wikidata allows you to create entries for faculty members that might not make it into Wikipedia. Questions were asked like, "Is just being a faculty member enough notability to be in Wikidata?" But the goal here is to build a robust citation network in Wikidata, adding items to support structure and more. One problem discussed was that not all language versions of Wikipedia have embraced Wikidata, so the benefit of Wikidata is not across the board. Presenters also shared about a new Wiki-project called Wiki abstract which hopes to dynamically pull summaries from Wikidata. The biggest takeaway was “Notability (Wikidata) is not the same as bibliographic warrant (authority control - NACO).”

Finding the Silver Lining in System Migrations: I discovered at the end of this session that it was originally intended as a large face-to-face program in New Orleans, had the AALL annual meeting and conference not gone virtual. It was planned to be a platform-neutral panel with speakers from a variety of law libraries talking about their migrations. As a result of things going virtual, this smaller session and the one following it (Hot Topic/Local Systems Committee Meeting: Making Post System Migration Efficient and Effective) covered the same terrain in two slices. There were so many takeaways from this session that I can't possibly share them all here, and even though the two speakers talked primarily about their library platforms, their joint experiences with systems and the discussion from attendees still rounded the session out to include a variety of platforms including III to Alma, Aleph, TIND, WMS, Folio, Sirsi, etc. A few of my favorite quotes and lessons from the presenters include:

- You have to always look out for other people (not just the records you touch).
- Always draw on the experience of people at other institutions who migrated before you, and don't be afraid to ask them, "Please help me! How did you do this?"
- You’ve got to build your own team. There’s the team you are forced to be part of (your department, your library, your university, your consortium) and then your own external team. That is the team you can build yourself, where you can gather info about the migration process from those at other institutions and share it with others like you later, after you have gone through it.
- Carve out management and leadership opportunities for staff and other librarians using migration as the backbone. Since it is such a major effort, it can be a milestone for any individual's professional growth and take them further in their career.
- Turn it into a bootcamp (like a mini two-day conference), where you are migrating from one platform to another. Invite others in your area going through the same process (example was a DC area libraries migrating from Sierra to Alma).
- Know that other things may have to be sacrificed along the way. You will not survive migration if you try to do everything you have always done during a migration (or any other major project). If you’re the manager, you should be shielding your team from the onslaught of "all the things" during a big migration.
• If you keep trying to do it all, you will not do any of it very well...and you may not make it. You have to think about prioritizing things in advance. What will you stop or delay to get the new, major work done?
• 3 years out and many are STILL cleaning up post-migration data messes. But it becomes the new normal.
• Get to know and use your university IT department as much as you can. That has been more helpful for people migrating than their law school's IT when there is not an ILS expert in your library or a true systems librarian at your library.
• Negotiate with staff and librarians to parse out what they really want and need to know how to do (you may need to reference interview the reference librarians!).
• Host a series of in-person sessions if you can (or virtual if you can't) to show staff and librarians how to do all the things they need for workflows as a live demo.
• Keep track of your training offerings and other documentation so you can show you did your due diligence for your library.

TS Resource Management Roundtable: Budget Cuts & Collecting Pivots: Wendy Moore from the University of Georgia Law Library led the discussion with a powerful statement that really summarizes the entire roundtable and the timeliness of the topics: "Crisis can lead to lots of creativity." Each of the panelists, Heather Buckwalter, Gilda Chiu-Ousland, and Anna Lawless-Collins, shared the state of things at their institution; the fallout from COVID-19 closures, including the stopping of shipments and the addition of online study aids and other e-resources to help students and faculty get through a quick pivot to virtual learning; and the budget that they are each facing for fiscal years 2021 and 2022. This session (as with several from day one of the summit) was not recorded to allow attendees to feel more comfortable sharing the details and situations of their library, law school, or larger institution. Two polls were executed in the larger Zoom room before dividing into smaller groups for more personalized and in-depth discussions. The polls were very interesting, revealing many of us still do not know our budget, or have vague numbers that are yet to be approved, and that the majority of us are cutting print journals more than any other area of our collections.

In the smaller groups, attendees were better able to share their own situations, including some very creative strategies for how to negotiate with vendors, what data they are using to make those decisions about what and how to cut items from the collection, and what they have already or are planning to cancel to meet the demands of the coming fiscal year. There was a big focus on mitigating expectations of faculty and other stakeholders, and many were open about having these difficult conversations with their faculty members related to monograph acquisitions and with their institutions related to print course reserve materials. Overall, an excellent program that was really open to sharing their situations so we can all learn from one another and continue best serving our library users.

Hot Topic: Technologies We Use: Presented by Jesse Lambertson, this session was more of an open discussion than a straight-forward presentation. Sharing his own library system as the beginning example, Lambertson pitched questions to the audience with lively responses in real time and invited members to unmute and speak to their specific system challenges in the work from home environment. It was interesting to hear individuals sharing the pros and cons of their various integrated library system platforms once they were catapulted into teleworking. The clear up-side to having a web-based interface was the ease that these librarians and their staff could quickly pivot to working from home without the hassle of using VPN or requiring remote desktop. These included those using TIND and Alma to name a couple. Several of us still working with III's Sierra were able to join in chorus about our struggles in working from home with spotty VPN support and the differences in Sierra web as compared to the desktop client.

For importing and exporting records, both individually or in batches, many hacks were shared, including creative ways to use Marc Edit when working from home and the potential for more API's between Marc Edit and the ILS. It is, of course, that time of year when we are all gathering statistics. With much overlap from the previous session I attended, many of us commented we are accessing collection and user data much more right now to better inform decision making in a time of budget cuts. As a result, further roadblocks and workflow workarounds were discussed for various systems. Several attendees shared how they query their system for cataloging and other statistics, the issues they experience in the format of the data they pull out, and the obstacles that come with trying to do this type of work from home or with very limited access to the library. Many individuals are periodically retrieving data from their systems, exporting it at txt or csv files, and then taking it home on laptops or flash drives to be able to spend more time with it.
when teleworking. Some shared more innovative approaches to both massaging data as well as collecting and sharing it, and Lamberton shared a highly creative approach using Python scripts to automate certain aspects of the csv to Excel conversion of his data. Another attendee shared their library's customized Google Sheets dashboard which pulls data from the ILS into the same location as reference transactions statistics (populated by Google Form responses). A truly fantastic session with lots of open dialogue between attendees. I am so glad I attended, and I can't wait to see and hear how the experiential system and data approaches our members are working with now unfold in the coming months and years as access to our offices and systems remains largely unknown during a pandemic.

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Program Report

Mindful Middle Management: A Dialogue on Managing Up, Down, and Within  

Alexis Zirpoli  
University of Michigan Law Library

Moderator:  
Holly Riccio, Director, California Judicial Center Library, San Francisco, California

Speakers:  
Susan deMaine, Director, Indiana University Maurer School of Law, Bloomington, Indiana  
Michelle Dewey, Legal Research Services Manager, BakerHostetler, Atlanta, Georgia  
Joseph Lawson, Deputy Director, Harris County Law Library, Houston, Texas

This program was not centered around any particular practice of mindfulness or meditation. Rather, the goal of this session was to provide tools and ideas to practice mindful middle management at work. The panel examined several different mindfulness models and created 6 broad categories or “pillars.” The panelists explained each pillar and shared their own experiences in applying these concepts in their careers.

1. Be Open to Experience and Have a Beginner’s Mind: Having a beginner’s mind means giving up pre-conceived notions of what you know or how things are done. It also means giving up fear of failure when wanting to try out new approaches. Quit worrying about the journey or the results, and be present in the moment. In terms of managing, this means being open about one’s own ignorance, especially in situations where one is a new manager. This also means seeking out the expectations of hierarchical superiors. Being open and having a beginner’s mind also opens us up to diverse ideas and approaches. Everyone is in a beginner position in dealing with the new realities presented by COVID-19.

2. Be Present in the Moment and Accept Reality: Slow down and purposefully guide your thoughts. Sometimes this is as simple as taking some deep breaths and focusing on your senses or sensations. Our brains contain two general states— the habit brain and the executive brain. The habit brain is useful for things like breathing. However, it has downsides, such as implicit biases. The executive brain is the part of the brain engaged when we’re present and focused and guide our thoughts. We can use this awareness to challenge habits. Being present also aids us in accepting the reality that we must deal with, which is necessary in the decision-making process.

3. Non-attachment and Non-striving: Non-attachment means letting go of negativity or worries. Non-striving is about trying less and being more—being present in the moment instead of being solely focused on outcome. There are many negative attachments inherent to the legal profession, such as status, winning, being smarter, etc. This makes this pillar particularly challenging as managers in this profession. We do need to achieve, but we need to pair that with actively being present and celebrating positives.

4. Compassion and Connection: One aspect of mindfulness as a practice is generating compassion for yourself and your own emotional reactions. By focusing on the moment, we allow ourselves to notice our reactions and let them just be. This allows us to investigate our responses with respect and healing. This applies to management by extending compassion and connection to others with whom we work. By engaging this way, we can develop greater empathy for where others are coming from. We enhance this empathy by learning about our employees and superiors as people. Doing so enables us to work with each other with greater efficiency.
5. Trust and Empowerment: Working as a manager means we must develop trust with our employees and our managers. Employees who feel trusted feel empowered. Managers need to have self-awareness to convey their trust. Employees don’t have access to all of the information and experience that managers have. There are 7 questions (linked in the handout) to ask ourselves to examine our practice of trust and empowerment.

6. Patience and Process and Peace: Thinking about being patient and trusting the processes that we develop. Moving away from being solely goal-oriented. Focus your worry not so much about performance, but on the practice of the process.

The slides are available at: https://50f378edf9ff4c9f6f9f-30f035c9227b07afda0d0be1818388ef.ssl.cf1.rackcdn.com/H-1376226-1047052-1-001.pdf. The recording (conference login required) is available at: https://www.eventscribe.com/2020/AALL2020/ajaxcalls/PresentationInfo.asp?efp=VE5HSEpMTEcxMzA4Mg&PresentationID=745366&rnd=0.928359.

Program Report

No JD? No Problem. Navigating Law Librarianship without a Legal Education

Jen Fell
Sacramento County Public Law Library

Coordinated and moderated by Sharalyn Williams (Public Services Librarian at Gonzaga University), this informative and inspiring program examined the benefits and opportunities for those in the profession without a Juris Doctorate (JD) while also touching on the scenarios in which a JD could prove valuable and worthwhile. Panelists included LiMin Fields (Manager of Research & Knowledge Services, LAC Group onsite at Sterne, Kessler, Goldstein & Fox P.L.L.C.); Steven Lastres (Director of Knowledge Management Services at Debevoise & Plimpton); and Brandi Robertson (Assistant Librarian at Homer M. Stark Law Library).

The program commenced with a presentation of data to support discussion, namely statistics from the American Association of Law Libraries (AALL) 2019 Salary Survey and the AALL Career Center. According to the 2019 Salary Survey, roughly 43% of respondents have an MLIS/MLS but not a JD, and 70% of academic law librarians have both degrees versus only 35% of corporate or private law librarians. An analysis of recent openings posted through the AALL Career Center illustrated a roughly even split of postings requiring both degrees and postings requiring only an MLIS/MLS. Unsurprisingly, most open positions in academic law libraries required a JD, whereas positions in operations (e.g. technical services, circulation, administration, etc.) tended to require an MLIS/MLS at minimum. Recent job title postings for applicants sans JD included Data Analyst, Competitive Intelligence Officer, Research Manager, Knowledge Management Officer, as well as some at the director level.

After a brief introduction into the panelists’ current positions and respective career paths, the heft of the program consisted of panel discussion around several key questions in the JD debate. Moderator/Coordinator Sharalyn Williams raised an interesting perspective when sharing some challenges she overcame by virtue of not having a JD, specifically that most of her challenges were internal: a fear of not measuring up to her colleagues with dual degrees and a fear of serving law students without a law degree herself. One of her solutions was to arm herself with knowledge in any way she could (using and creating research guides helped immensely) and to remind herself that her MLIS had given her the tools to connect research problems with research solutions and, therefore, she was perfectly equipped for her position.

In the same vein, panelist LiMin Fields shared that though a JD may have helped her better understand the research problems she undertook in the beginning, she takes solace in the fact that her firm had sought her out for her unique combination of skills and experience. She emphasized that she relies on her MLIS background and her innate creativity to make connections, apply solutions, and communicate those solutions to stakeholders.

For those just entering the profession, panelist Brandi Robertson heartily recommended reaching out and connecting to people, whether through AALL networking channels (conferences, mentorships, and meetings), local chapter or bar association events, or vendor trainings. Panelist Steve Lastres echoed those suggestions, adding that new law librarians
will need to be comfortable with technology; he suggested membership and/or trainings through International Legal Technology Association (ILTA) or a similar group. Both panelists agreed that seeking out mentors in your desired track or niche would be invaluable, especially as the profession is favoring specialists rather than generalists.

An interesting discussion followed on whether a JD was necessary to succeed in the panelists’ current fields, the consensus being “it depends.” More specifically, the panelists agreed that the benefits of pursuing a JD (in addition to an MLIS) would be most dependent on one’s ultimate career goals. For example, law librarians in the academic community typically must have a dual degree if they want to teach legal research, work reference, and pursue management positions. In contrast, a JD is typically not necessary to work successfully as an analyst or researcher in a private law firm. That said, panelist Steve Lastres pointed out that those in such a role wishing to advance to a position in management may find a JD helpful for the additional knowledge, if not the influence.

Perhaps most germane to this topic was the concluding discussion on imposter syndrome: the signs, the different types (many librarians fall into “The Expert” category), and the ways in which we can manage imposter syndrome if (when?) it appears. Some advice I found especially helpful is to seek out knowledge and skill development as needed, rather than out of a sense of lack or inferiority. Another strategy the panelists suggested is to avoid self-isolation, especially amongst those colleagues with whom you may feel insecure. Rather, reach out and use their knowledge to strengthen and broaden your own, seeking expertise when and where you can find it.

The program concluded with a Q&A session from the participants, touching on tips for obtaining legal education without enrolling in a JD program; advice on gaining an additional graduate degree (not a JD) to enhance one’s MLIS/MLS; and suggestions for advancement for non-JD holders. Overall, the program was insightful, encouraging, and applicable for information professionals in academia, the private sector, and the government sector. Attendees received a wealth of information and experience from the diverse panel and left with a lot to both reflect on and act on to better respond to our ever-changing professional landscape.

**Program Report**

**Working from Home: Lost in Space, Home Alone, or Harry Potter and the Sorcerer’s Stone**

*Judy A. Chalmers*

*Sacramento County Public Law Library*

Coordinated by Michele Masis, Reference Librarian, U.S. Department of Justice, Washington, D.C. She is working from home in Denver, Colorado.


Speaker/Christy Smith, Head of Collection Services, Seton Hall University of Peter W. Rodino, Jr. Law Library Center for Information and Technology, Newark, New Jersey. She is working from home in Tulsa, Oklahoma.

Speaker/Carolyn Ford, Research Librarian, Littler Mendelson, P.C. in Kansas City, Missouri. She is working from home in Olathe, Kansas.

In this interesting session, three law librarians who telework discussed how teleworking is being implemented and used properly, the positive culture around telework, and the pros and cons of this growing trend. The speakers hold law librarian positions in government agencies, an academic library, and a corporation.

These law librarians were clear to point out they held telework positions before the pandemic began, which is different from how it may be for law librarians who scrambled to find projects to do at home during the pandemic. Many law
Librarians will go back to their office, while some may continue to telework. Some institutions may gain a greater respect for and openness for employees to telework post pandemic.

Librarians have always excelled at seeking new opportunities to learn and problem solve. These speakers demonstrated the significant advantages in working from home on a regular basis. Telework has met their needs for a satisfying work-life balance while successfully meeting the needs of their employers.

The pros for working at home include getting more work done, which results in improved productivity. The employee’s ability to focus their attention with few interruptions is significant. Teleworkers have no commute times, and for some, this saves several hours per day. For librarians in later years of their career, they enjoy the less hectic environment and quietness of home while still having the satisfaction of doing good work.

There may be cons when beginning to telework. When at home, you must put in the extra effort to stay connected with colleagues. Many technology options available today make this possible by using chat messaging, Zoom meetings, email and phone conferences, and other technologies. It is important to have the discipline to keep a regular work schedule, as it is easy to overwork.

There are some misconceptions of employees who telework. Sometimes, others have a disbelief that you are actually working. There is a false image of a teleworker rolling out of bed and going to work in their pajamas with their hair a mess when in fact, these experienced teleworkers dress every day and fix their hair as if they were still in the office. It helps them to separate work time and personal time.

The speakers provided valuable advice to librarians who are considering telework. Consider the equipment expense and whether needed equipment will be provided. Consider your personality and work style. Take responsibility so that you are not forgotten by keeping in touch with colleagues. Finally, never take advantage of the trust put in you.

Program Report

Library 3.0: Using UX to Create the Library Space of the Future

Rachel Evans
University of Georgia School of Law

Presenters: Amy Eaton, Director of Library & Research Services, Perkins Coie LLP; Yolanda Jones, Law Library Director, Florida A & M University College of Law; Billie Jo Kaufman, Law Library Director, Mercer University School of Law; Whitney Curtis, Associate Director, Barry University School of Law

This was one of the sessions at AALL that I sectioned off my calendar for, to make sure I didn’t miss the live stream. As with many of the virtual conference sessions this year, it did a great job of tying the topic in with the current pandemic reality by specifically asking the panelists about how things have changed since COVID-19. Early on, the moderator shared some very good principles of user experience; however, I immediately disagreed with the very first point of “You are not your user.” This is up for debate. Sometimes the most intense library user is the librarian or staff member who perhaps accesses a resource more often than end users do. I tried not to let myself get hung up on this, though, since the rest of the principles (and the rest of the session) were very thoughtful and full of perspective from the panel of speakers. “The user is not broken” is so true and an important one we cannot commit to memory enough. Good UX requires research and empathy. It must be universal, intentional, holistic, and above all, “easy before it can be interesting.” These were all excellent points that set the stage for the rest of the presentation. Each speaker answered different questions and shared examples that included photos of how they used user-centered design to approach physical spaces and services in the library. There was quite a bit of talk about policies and how that relates to customer service.

I wanted to highlight my favorite quotes from each of the speakers that I found noteworthy:

“Make sure that your signage matches your services policy.” & “Don’t make a rule you can’t enforce.”
- Billie Jo Kaufman
“I make sure my service philosophy encompasses all of our user groups...to help them find the information they need for their scholarship, their work, and their personal lives.”
- Yolanda Jones

“We used to have all of these processes in place, but, ultimately, we end up saying ‘yes’ to almost all requests. Why not just empower people to make those decisions?”
- Amy Eaton

My personal let down from this session was I had an unrealistic expectation that with “3.0” and “UX” in the title, the session would also talk about virtual services, especially as it related to the COVID-19 reopening planning that has been on everyone’s mind over the summer. User experience is more important than ever for our libraries, particularly in a world where much of the interaction is (and may continue to be) happening more often online than not. Towards the end of the session, I appreciated the thoughtful comments from the panelists about reopening. They talked about how they were thinking in regards to their physical spaces now and what may change this fall. Each of them honestly shared they were still trying to figure things out. However, the questions they vocalized candidly really opened things up for a better discussion and had my gears spinning for taking their approaches shared earlier in the session pre-pandemic and applying that user experience perspective to the ever-approaching prospect of Fall 2020. The comments in the discussion, which are still available if you missed this session live streamed and would like to watch the recording, were insightful with librarians across the country sharing their experiences and concerns. Many attendees commented on the very real concern of library seating negatively impacting individuals who are from marginalized groups that do not otherwise have a quiet place to work or study or may not have the technology on their own to accomplish the same thing. Our spaces are more than just resources and services: they are somewhere people can go as a respite. Without the library, many users would be lost in more ways than we can fathom. Access is vital, but access at the resource level is not the only form of access our users need.

Program Report

Change the Subject: How a Cataloging Term Became a Flashpoint in the Immigration Debate Recap

Stacey Pilson
Norton Rose Fulbright US LLP

Moderator: Cate Kellett, Catalog & Government Documents Librarian, Yale Law School

Speakers: Jill Baron, Librarian and Filmmaker, Dartmouth College; Melissa Padilla, Film Producer, Dartmouth College

The session was an eye-opening discussion about Jill Baron and Melissa Padilla’s documentary, Change the Subject, and the importance of words and advocacy. The speakers opened with some questions for the audience: Did we see opportunities for social justice in our libraries? Are there resources to transform any problematic issues? As a law firm librarian, I didn’t really think there was, but I was intrigued.

They showed some clips from the film to highlight what Melissa felt when she saw the “i-word” (illegal aliens) in the catalog and how that led her to activism and to Jill Baron at the reference desk. Neither of them thought it would turn into the big deal that it has. We all need to remember the importance of words, the importance of having difficult conversations, and the importance of standing up for what we believe. Melissa, Jill, and the other Dartmouth students and community they brought together did not let setbacks stop them. They learned that one little catalog is connected to others and that the cataloging world is large and moves slowly, but it can move and change. It has moved and changed for other subjects that are no longer seen as proper, so should the “i-word” be changed. Their suggestion is “Undocumented immigrant.” The battle is still ongoing, as the subject heading has not been changed.

The speakers also mentioned the work of the SAC (Subject Analysis Committee) Working Group of the American Library Association (which submitted a report in June 2020) to show how the work still goes on. The takeaway was that
the library community doesn’t have to wait for the Library of Congress to act; they now can make changes to their local systems.

Through the movie and their journey, they both learned more about how cataloging and how the Library of Congress Subject Headings work. They talked of other terms that should be reviewed, suggestions including terms around gender, sexual orientation, and indigenous people. They reminded us that we all have the responsibility to stand up for what is right, and that it is important to get used to having difficult conversations.

This program made me realize the importance of being a good and conscientious cataloger, of being open to new ideas, and to not placing large institutions on a pedestal. Just because we always did something one way doesn’t mean that it shouldn’t be changed. And just because it is a Library of Congress Subject Heading, that doesn’t make it right. I am in the midst of doing subject clean-up in my own catalog, and I do now look at things in a new light after this program.

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**Program Report**

**Data, Stats, Go! Navigating the Intersections of Cataloging, E-Resource, & Web Analytic Reporting**

*Stacey Pilson*  
*Norton Rose Fulbright US LLP*

Speakers: Rachel Evans, Metadata Services & Special Collections Librarian, UGA Law Library; Andre Davison, Research Technology Manager, Blank Rome; Jessica Pasquale, Head of Scholarly Publishing & Intellectual Access, University of Michigan Law Library; Wendy Moore, Associate Director for Collection Services, UGS Law Library

This session was about the different types of data a library can collect (either manually or automatically) and how they can use the data to tell a story or provide information.

Part one focused on what they called the “Landscape,” i.e., where do you get your data from? Each of the speakers told where they got their data: from their library system, document management system, or spreadsheets they manually updated. Our first poll question asked where we got our data, and most people responded from the library catalog. We also put our answers on one side of our piece of paper.

Part two focused on what you can and cannot do with the data you have collected. They called them “Pain Points.” Andre Davison showed that your reports can only be as good as the data you have collected. Sometimes he got the data that he wanted in ways that were helpful; sometimes he did not. The second poll question asked what types of data we collected, and the primary answer was keeping reference statistics. We were asked to flip the paper over and write our answers on the other side.

Part three covered the three different ways to share your data with others. The simplest are spreadsheets and documents with basic charts and graphs. The next level included Canva and Piktochart, in which you can make interactive graphs and infographics. The top-level apps, like Tableau, could do even more sophisticated data visualization. They said to be willing to take online courses to learn beyond the basics of Excel to get started with simple things. They also recommended Canva and advanced Google Docs to learn some fun advanced techniques. When asked the poll question about how we share our data, the audience overwhelmingly responded with “spreadsheets.”

Part four was a DIY section. They asked us to think about the stories we want to tell, to think about the systems where we get the information, and the tools we can use to visualize it. What are you tracking? Is it the most usable data? Should you track something else? They highlighted their favorite tools and challenged us to try something different. Could I make my story better?

This was a fun, interactive presentation, with origami, poll questions, and a lively chat discussion. They definitely kept us engaged on what could have been a bland and boring topic.
Jeff Pearlman

Jeff, who is the Intellectual Property and Technology Clinic Director and Clinical Assistant Professor of Law at U.S.C., presented on the Georgia v. Public.resource.org case, a recent U.S. Supreme Court case, and briefly on the National Emergency Library. When the Georgia v. Public.resource.org case arrived at the Supreme Court, the basic question was whether non-binding annotations in the official code of Georgia were copyrightable and ownable by the State of Georgia. Basically at issue are the non-binding annotations in the Official Code of Georgia Annotated.

Public.resource.org is a non-profit organization, funded by Carl Malamud, which scans local, state, federal, U.S., and international laws and makes them available online in accessible formats for free for everyone to download. The problem is not everyone agrees on what the law is and whether this is legal. Its mission is to “make government information more broadly available and promote universal access to all human knowledge.” The Official Code of Georgia Annotated (OCGA) is the only official code of Georgia. It is made jointly by the State of Georgia’s Code Revision Commission and by contracting with Lexis, which drafts non-binding annotations to accompany the code. Lexis makes the code available to paid subscribers and the unannotated code on its site for free. Georgia makes the physical annotated code only available in some Georgia facilities; however, no copyright-free or downloadable version of the unannotated code exists. Public.resource.org bought the print version of the code, scanned it, and made it accessible online freely.

Although the law is never copyrightable, annotations are, and this case falls into the middle ground. The question is whether the government edicts doctrine extends to—and thus renders uncopyrightable—works that lack the force of law, such as the annotations in the Official Code of Georgia Annotated. He presented three amicus briefs supporting public.resource.org, including one that AALL was a signatory to. The decision was that annotations are not copyrightable. The reasoning was that author is the key; if a judge or legislator creates a work in the course of their official duties, then “force of law” doesn’t matter, and the work is not copyrightable. There are two pending cases in the D.C. District Court to watch, A.S.T.M. v. Public.resource.org and A.G.R.A v. Public.resource.org, which Georgia may impact. While this decision settles one model, there are many other types of code creation models, so remain vigilant. He concluded the discussion by emphasizing that patrons should know the free law sources that are available to them but also recognize that sometimes, there are still advantages to the licensed sources.

The Open Library, a project of the Internet Archive, was in the news earlier this year. Normally, the Library allowed the public to temporarily “borrow” books they scanned (protected by Digital Rights Management) and limited the number of borrowers to the actual number of physical copies it holds. During the pandemic, when everyone was learning from home, in March 2020, the Internet Archive removed the limitation on the number of simultaneous “borrowers.” Then a group of publishers filed a lawsuit on June 1, 2020, which shut down the National Emergency Library early. The controlled digital lending policy continues.

Mary E. Rasenberger

Mary, who is the Executive Director of the Authors Guild, discussed how authors can get their rights back, specifically reversion and statutory termination rights. The title of her presentation was “Taking Back Copyright: Reversion and Statutory Termination Rights.” She also prefaced the presentation by stating that the Authors Guild was one of the organizations that came out opposing the National Emergency Library and the Open Library, particularly trade authors. There are many reasons why authors may pursue getting their copyrights back from publishers. Reversion of rights is strictly a matter of contract law. Generally, this contractual right can be exercised anytime from two to three years after the publication is “out of print,” and the definition of “out of print” is key. The second way authors can get their rights back is called termination of grants, which is a right created by statute that can only be exercised 35 to 40 years after publication or 40 to 45 years after grant. Publishing contracts generally grant publishers exclusive rights for the full
term of copyright (author’s life plus 70 years), but most contracts have an “out of print” or “reversion of rights” clause that allows authors to reclaim all rights when the book is no longer being sold by the publisher. To determine a reversion of rights, look for these elements: definition of “out of print,” when author can exercise rights, and how author can exercise rights—including notice requirements, author responsibilities, and publisher responsibilities. This year, the Authors Guild reissued the Authors Guild Model Contract. In the digital age, publishers can make any book that is published available permanently as a print on demand copy or as an eBook. When requesting reversion of rights, the author must send a request to the publisher and follow section 203 and 204 of the Copyright Law. A notice of termination is also required, which must be recorded with the Copyright Office.

Cindy Guyer

Cindy Guyer, a senior law librarian at the University of Southern California, presented on “Keeping Social Media Posts Copyright Compliant.” In this presentation, Guyer discusses why and how to ensure social media posts remain copyright compliant. Since publication and registration are not required to secure a copyright, social media posts remain largely unregulated. The two common “exceptions” to the copyright law are fair use and public domain. To qualify for fair use, there are four factors to consider, which are determined on a case-by-case basis. Fair use is designed for commentary, criticism, parody, news reporting, research, and educational purposes. There is a common misunderstanding about public domain versus publicly available. Although social media posts are publicly available, they do not lose copyright protection. Therefore, Cindy reminded us that ensuring copyright compliance is the creator’s responsibility. When posting on social media, copyright protection is automatically granted to the account holder. Alternatively, others retain copyrights to their work, and others simply cannot copy posts without proper attribution or post copyrighted works on social media platforms without permission. So, when posting on social media, look for works in the public domain or purchase stock images to ensure copyright compliance. There are also many tools to utilize to help guide you to public domain resources. Creative Common platforms offer one solution. Although Creative Commons license holders retain a copyright, they grant permission for others to use the work (uses vary depending on licenses).

Program Report

Updating Your Emergency Plans: From Pandemics to Acts of Violence to Extreme Weather

Heather Kiger
Library of Congress

Speakers: Heather Kushnerick, Lacy Rakestraw, and Anna Russell.

Each speaker shared the unique circumstances of emergencies that struck their libraries and how their institutions responded. They addressed the role of emergency planning (or lack thereof) in the aftermath and how it relates to operations under COVID-19. All made it clear that whether or not we have a leadership role in our organization, we each have a responsibility to train, plan, and speak up if something needs to be addressed.

Heather Kushnerick, of the Fred Parks Law Library, South Texas College of Law Houston, spoke about the flooding connected with Hurricane Harvey in 2017. The library itself did not flood, and as flooding is a frequent concern for Houston, the library had everything in place for handling a potential flood. Rather, the major challenges were the impossibility of getting to or from the campus, when most regional infrastructure was underwater for days and there was the more pressing concern of flooded homes. The college was closed for a week while waiting for floodwaters to drain, and this was the impetus to develop a continuity plan for campus closures. The school was quick to make sure everyone had web conferencing capabilities and implemented a password management system that allowed staff to take up the duties of those who could not get to work or online.

The school was in the process of updating their emergency plan when the hurricane hit, and the library had just submitted their departmental disaster plan. They found that having a library staff member serve on the institution’s emergency management team keeps the library’s needs on the institution’s radar and keeps the library informed about emergency preparation.
These transitions, though challenging at the time, proved crucial to their current success in operating under COVID-19. With the emergency preparations put in place after Hurricane Harvey, the school was able to move classes fully online as soon as community spread of COVID-19 was announced in March, and students didn’t miss a day of class. The same day, library staff prepared for longer-term facility closure by taking home everything they would need to do their usual work, and this soon became necessary. This occurred right before Spring Break, which allowed staff time to set up their home work stations and practice operating in the new online environment.

Lacy Rakestraw, of the St. Louis County (Missouri) Law Library, described an armed shooter incident at the county courthouse that has had a lasting impact. Notably, an emergency planning meeting took place at the courthouse within hours before the shooting occurred to begin addressing security shortcomings at the facility. In the decades since, the incident has fueled a persistent emphasis on security screening. Security for the facility is now more like airport security, with only judges and court executives exempt from screening (though now, with COVID-19, they, too, must be screened). Panic buttons are installed in the library, as is a police radio for monitoring activity throughout the building.

Rakestraw makes a point of becoming friends with all law enforcement and security personnel in the courthouse (including the police dogs!). With strong, authentic relationships, there is a natural inclination for these personnel to drop by to say hello and check on library staff, and this added presence increases the sense of security. There is also an emergency code-phrase in place among staff so that a second staff member knows to step in to deescalate a problem situation. If the situation gets beyond the control of that deescalating staff member, other staff watch to see if they make a certain hand motion, which is their signal to call the police.

During the pandemic, the library remains open to judges, and at least one reference librarian has been onsite during business hours. Rakestraw’s duties, however, shifted to that of a staff attorney and administrator for the courthouse as a whole as they navigate the challenges of reopening the facility.

Anna Russell is the Alaska Branch Librarian for the US Court of Appeals, Ninth Circuit, which experienced a 7.0 earthquake during the workday in December 2018. Timelines of staff emotional responses, closed-circuit video footage, and photos of the library’s damage helped illustrate the gravity and ongoing stresses library staff faced in the moment and the hours, days, and months following. The focus of this portion of the presentation was on planning for any unplanned emergency, rather than how their existing emergency plan worked. Not every emergency or disaster can be anticipated, but looking at the basic needs, emotional states, and common challenges that occur in such events improves overall preparedness. It is equally important to consider how these events can impact the larger city or region when preparing the library.

Russell advised that during a big enough disaster, a written emergency plan is forgotten; only teamwork, common sense, and prior planning and practice can be relied upon in the moment. A continuity-of-operations plan (COOP), though wise to draft in advance, may need adjustment in the first weeks following the disaster. The emergency plan, which is a separate document, is used in conjunction with the COOP during this time while restoring basic operations.

It took quite a while for staff to discuss and incorporate earthquakes into their emergency plan afterward, because most people did not want to rehash the traumatic disaster they had survived. Once healing is well underway, though, we shouldn’t miss the valuable opportunity to use that experience to learn and improve. If we take the time to identify how we have reacted in emergencies, individually and as organizations, we can start having better reactions in the future.

Speakers were asked for suggestions on helping staff who freeze up in emergency-related training. One idea was to pair junior staff with more experienced staff to build the newer staff’s confidence, and to start with small, less stressful practices. Additionally, injecting some levity has proven very helpful because it calms the mind in that moment, better allowing the individual to engage in the activity and potentially allows us to function better in the actual emergency. However, some level of fear, or at least recognizing that the scenario really can or will happen to us, motivates preparation. One attendee suggested that when staff are complacent about emergency planning because it isn’t a pressing need, bring in someone who lived through such an emergency first-hand and have them share what they went through. It was certainly helpful hearing these librarians’ experiences to better round out my own emergency planning.
Continued from page 1

linking fields (776) to other available formats, such as print and online. Separate microfiche records were also created for much of the past, except as noted at the end of this article.

| 533 | \( a \) Format of the reproduction. \( m \) Sequential designation of issues reproduced (for serials) \( b \) Place : \( c \) Name of the agency responsible for the reproduction. If unknown, record \( b \) [Place of publication not identified] : \( c \) [publisher not identified], \( d \) date of reproduction. \( e \) extent of reproduction. \( f \) (Series statement of the reproduction). \( n \) Note about reproduction. |

Example 2: $a Microfilm.$b Buffalo, N.Y. :$c W.S. Hein,$d [1986?]-$ereels : negative ; 16 mm.

All microform bibliographic records require a 007 field (physical description fixed field). See https://www.oclc.org/bibformats/en/0xx/007micro.html for guidance.

Example 1: h $b d l d b b c i f c--- i g c b b u i u i j u $ (Item is a microform; released as a microfilm reel; it has negative polarity; is 70 mm; has a high reduction ratio; and is in color. Its emulsion, generation, and film base are unknown.)

Example 2: h $b e l b i h b e m i f b 024 i g b b b a l i c i j a $ (Item is a microform (originally a printed work that has been filmed for reproduction in the microfiche format); released as a microfiche; has negative polarity; is approximately 4 x 6 in.; has a normal reduction ratio of 24:1; is monochromatic; has an emulsion of silver halide; is a service copy; and is on safety base film.)

There is one fixed field that really matters in microform cataloging. I am using the OCLC name here, your ILS may differ slightly.

Form: Form of item.
a = Microfilm
b= Microfiche

Variable Data Fields:
Record all manifestation elements (title, statement of responsibility, publication statement, extent, etc.) of the original resource and add/modify the following fields (substitute your OCLC tag for [Tag] of course). The 533 field was discussed earlier:

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Special mention should be made of the 776 field (additional physical form entry). Current LC practice is to link the record for the microform item to records in other formats such as print or online.

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This is a fine example of a properly cataloged microform record under current RDA rules and policy statements. The 264 field (publication, distribution, etc.) and 300 field (physical description) all match the original item. If you cannot ascertain the spine height of the original item, it can, of course, be left out of the 300 field. Pagination and illustrative material, if any, will suffice.

The “microformness” of the item is reflected in the 33X and 533 fields. And notice the 245 (title statement) field. $h [microform] is no more! The General Material Designation of AACR2 is gone for good. OCLC began removal of existing GMDs from bibliographic records in March 2016. The 33X fields (content, media, and carrier) have replaced it. And finally, notice that the cataloger followed LC practice by linking the record for the microform item to the record in print format via a 776 (additional physical form) field.

So, remember:

336: : text|btxt|2rdaccontent
337: : microform|bh|2rdamedia
338: : microfiche|bhe|2rdacarrier or,
338: : microfilm reel|bhd|2rdacarrier

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Ligiting religious land use cases

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It should be noted that microfiche will almost invariably have an eye-readable header title. In most cases, that is not a problem, as the header title will match the title proper. But sometimes, the header title will be different, be an abbreviation, or, if the fiche is a serial, the header title will be that of an earlier or later title. In that case, it is recommended that a 246 field for a varying form of title be included in the bibliographical record. For example:

245: 04 : The Wisconsin bar bulletin|h[microform].
246: 1 : |iTITLE ON HEADER:|aWisconsin State Bar Bulletin|fv.22-25

In the case of microfilm, there is a chance that a box title may differ from the title proper, if for no other reason than space. In that case, follow the above procedure, and simply substitute Si HEADER TITLE with Si TITLE ON BOX.

And finally, some microform sets may come with a printed guide. The guide should be cataloged separately, preferably with the same call number as the corresponding microforms, and an “Accompanied by” note with the guide’s title mentioned in the bibliographic record for the microform.

In conclusion, although there are some differences between cataloging microforms and print materials, there are far more similarities than differences. The rules, policy statements and recommendations in this article should more than suffice.

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**Technical Services Law Librarian (TSLL) Annual Report**

**July 2019-June 2020**

The *Technical Services Law Librarian (TSLL)* volume 45 had four issues, published in PDF and available on the *TSLL* website at https://www.aallnet.org/tssis/resources-publications/technical-services-law-librarian/ and on HeinOnline at https://heinonline.org/HOL/Index?index=lcc/tsll&collection=aallar (note that there is a one year embargo on full text access via HeinOnline). I am extremely grateful to the *TSLL* staff for their work on this, and every, volume. Thanks to their efforts, all issues of volume 45 were published on schedule. The editor-in-chief also greatly appreciates the work done by our dedicated columnists and editorial board, without whom this publication would not exist.

A number of columnist changes occurred at the beginning of this volume. Gypsy Moody and Matthew Jenks left law librarianship, with Christopher Thomas taking over the OCLC column and Heather Kushnerick the Preservation column. Jackie Magagnosc began a new column, Conference Round-up, with Travis Spence taking over the helm of the TSLL TechScans blog and column. Aaron Kuperman stepped down in preparation for retirement, and George Prager has stepped in as the new Classification columnist. Finally, JoAnn Hounshell stepped away from the Private Law Libraries column, with Dana Deseck-Piazzon taking over in her place.

The only change among the editorial staff during the year was the position of Layout Editor. After approximately fifteen years, Julie Stauffer decided to step away from this role. Sabrina A. Davis began working with Julie at the beginning of the volume and has fully taken over as Layout Editor at this time. On the editorial board, Sara Campbell and Linda Tesar completed their two-year terms. The other board members for 2019-2020 were Rachel Evans and Thomas Ma.

We are looking forward to the upcoming year and some of the changes that are in store, although it will likely be somewhat different from years past. Changes to how we work and gather following the onset of the COVID-19 pandemic have left us somewhat unsure of what lies in store for us. However, one thing will remain—our members will continue to provide support for each other through their participation and contribution to the SISs and *TSLL*.

As a final note, this will be my last annual report for *TSLL*. I have decided to step down as of the conclusion of volume 45 (June 2020). Sara Campbell, formerly of the *TSLL* editorial board, will be taking over as the new Editor-in-Chief as of the September 2020 volume. It has been an honor to have played a part in the ongoing publication of this newsletter,
but I feel it is time to move into a different direction. I want to thank the readers and TS/OBS membership for their support over the last two years.

Emory University School of Law
Hugh F. MacMillan Law Library