

MEMORANDUM

TO: AALL Executive Board

FROM: ALA Liaisons Review Special Committee
Artie Berns, Chair
Prano Amjadi, Member
Marlene Gebauer, Member
Jane Larrington, Member
Joseph Lawson, Member
Stefanie Pearlman, Member
Lauren Seney, Member
Paula Davidson, Staff Liaison
Meg Kribble, Board Liaison

RE: Report and Recommendation

DATE: February 16, 2018

President Greg Lambert appointed this special committee to evaluate AALL support for the cataloging liaisons to ALA's Subject Analysis Committee (SAC), ALA's Committee on Cataloging: Description and Access (CC:DA), and the MARC Advisory Committee (MAC). The committee's charge included requests for specific findings that are each addressed below.

FINDINGS

Specific findings requested in the charge have italicized headings. Other relevant findings have underlined headings.

Study of other professional library associations funding and/or support for similar positions, including number of positions funded, in what amount, and for which ALA committees.

Research from 2015 on the liaison funding issue revealed this information about other professional library associations. This information was checked and found to still be accurate:

- American Theological Library Association: ATLA has a staff member serve as the liaisons to various ALA committees, including technical service related committees. They do pay for the staff members expenses at the ALA meetings.
- Special Libraries Association: They do not fund liaisons to ALA committees or to the meetings. There are not any official SLA liaisons to any of these committees.
- Medical Library Association: They do not fund liaisons to ALA committees. The liaisons are responsible for their own expenses.
- Music Library Association: Chairs of each of their technical services related subcommittees receive support to attend both ALA meetings.
 - Early ALA registration
 - Airfare and ground transportation
 - Hotel (chairs are asked to share rooms when possible)

- One-half the US government per diem for food and incidental

Assess the value of the ALA liaison program to AALL members, including definable outcomes in support of law librarianship.

The committee explored this in several ways. First, we sought general statements on the value of the liaison program, from the perspective of the leadership of AALL SISs and Chapters and from the perspectives of individual AALL members.

Value of ALA liaison program to AAL SISs, Chapters, & individual members

We received responses from ALL-SIS, GLL-SIS, LISP-SIS, OBS-SIS, PLLIP-SIS, RIPS-SIS, SR-SIS, and TS-SIS (plus a separate communication from the TS-SIS Standing Committee on Cataloging and Classification). All responses from SISs were generally in favor of funding the liaisons.

Specific reasons SISs gave for supporting AALL funding included:

- Not having the liaisons in these international standard setting bodies will risk that legal materials will be cataloged incorrectly and/or will be more difficult to find.
- The liaisons represent AALLs core values.
- Cataloging is currently undergoing fundamental changes and we need our liaisons in place as this evolution takes place.

One SIS while in support of AALL funding expressed there should also be “demonstrated value and reporting to educate our members on the need for this support.”

The SISs also demonstrated their appreciation of the value of the liaison program by providing direct financial support this year. As a result of the defunding by AALL, the SIS Council asked SISs to contribute funds directly to support the activities of the three liaisons for this year in the following levels based on SIS size: small SISs (0-199), \$75; medium SISs (200-499), \$300; large SISs (500+), \$750. SISs contributed and collectively raised \$4,450 for funding the liaisons.

We received no responses from AALL Chapters.

Individual members sent in eleven communications.

There were nine communications from individual members in favor of AALL support, making these comments:

- Legal information is unique and requires the expertise of law librarians on cataloging committees.
- The liaison’s reports on cataloging developments benefit all AALL members and in particular, other catalogers.
- If AALL is not represented by these liaisons, over time legal information will become less and less discoverable because the people left to make the cataloging rules will not understand the nuances of legal materials.
- Liaisons represent AALL’s core values.

- The liaisons are a relatively cheap way for AALL to advocate for law libraries.

There were two communications from individual members against AALL support, raising these issues:

- Not against liaison program but source of support funding should not be AALL as a whole but rather TS-SIS.
- Liaisons should attempt to communicate their value to those who are not in TS-SIS and who may not understand what it is they are doing. i.e. produce versions of their respective reports which will be easily understood by non-catalogers.

Another important issue was raised in the individual comments, many of which came from technical services librarians. In addition to expressing liaison support, these librarians also raised concerns that they felt disenfranchised or ignored by AALL. Some even suggested that their professional needs might be better served by another professional organization. To quote one member:

Do you know what it feels like to be a long-time member and hard-working contributor to the OBS and TS SISs, yet to continually be treated like you are irrelevant to the overall organization? Well, I most certainly do, after 34 years of involvement in those SISs, as well as AALL in general. And I tell you, it really stings, to the point that I have stopped attending the AALL annual conferences and started attending ALA's conferences instead. This is in spite of the fact that I am constantly asked to take on leadership roles within the SISs and have to turn them down. And that is agony for me because I so value my technical services law colleagues and have built such close, essential relationships with them over the course of my career.

AALL stands to lose money on conference registrations should cataloging librarians follow the example of this member.

Additionally, the value of the liaison program is demonstrated by continued efforts to revive AALL funding. This committee searched the board books and minutes since the board's February 2015 decision to defund 10 representative programs. We found that four of the positions were not mentioned again. Two of the positions (representatives to the National Center for State Courts & Self-Represented Litigation Network) were mentioned once in an SIS-Council report concerning an informal and unsuccessful discussion with the executive board about reinstatement of those positions. One position (representative to the International Federation of Library Associations and Institutions) was subject to an unsuccessful formal attempt to be reinstated with reduced funding by an individual member. The CC:DA, MAC, and SAC positions have been subject to multiple and persistent attempts to reverse the board's decision to eliminate these positions. These attempts include the successful request to temporarily continue funding by TS-SIS, a successful joint request by TS-SIS & OBS-SIS to reinstate official status to representation to these committees (although unfunded), and the SIS council request that the positions be refunded which resulted in the formation of the present ALA Liaisons Review Special Committee.

Given the responses of SISs, individual members, the actions of the SISs in collectively providing supplemental funding, and the repeated attempts to reverse the board's decision by various groups within AALL (especially when compared to the lack of attempts to reinstate the other eliminated positions), we find that AALL members do value the liaison program.

Definable outcomes in support of law librarianship

Second, we sought evidence of specific outcomes that were attributable to the ALA liaison program. We analyzed letters submitted by current and former liaisons and discussed this issue with the current liaisons to CC:DA, MAC, and SAC. We also asked the Chair of the TS-SIS Cataloging and Classification Committee to reach out to members about this subject.

The following is a non-exclusive list of actual accomplishments of the current and former liaisons to CC:DA, MAC, and SAC.

- From 2013-2015 our representatives to ALA's Committee on Cataloging: Description and Access (CC:DA) proposed major revisions to the cataloging code Resource Description and Access (RDA). These proposals have been adopted by the wider community and have resulted in significant improvements to the cataloging of treaties and compilations of laws.
- The law community became the first specialized area to devise and implement Library of Congress-approved genre headings, allowing us to separate books about laws from actual codes and statutes. These new terms enhance discoverability of resources in our faceted catalogs. Our representative marshalled our trailblazing work three years ahead of the art and literature communities and two years ahead of the music community.
- Our representative to CC:DA put forward a proposal for single laws that govern more than one jurisdiction. It was accepted with some revisions and included in the RDA Toolkit in April 2017.
- In 2004, the AALL rep to SAC, was asked about inherently legal subject headings and how they could be identified. Since there was nothing in the authority records to signal the legal status of the headings, the AALL Cataloging and Classification Committee decided to tackle the problem by forming the Inherently Legal Subject Headings (ILSH) Project. Participants identified ambiguously legal headings and submitted the list to Policy and Standards division of the Library of Congress (PSD), who added "Law and legislation" see references to the relevant authority records. When the project was done, many people at SAC expressed their gratitude to AALL for providing these helpful references.
- In the early 2000's the OCLC FAST database contained data extracted from WorldCat that could give us an indication how much ambiguity there was about the legal status of some headings and the proper use of Law and legislation subdivisions. At a meeting of the SAC subcommittee on FAST, the leader of the FAST project graciously agreed to send us the relevant data. That data, once analyzed, proved to be extremely useful. To reciprocate, a group of AALL volunteers helped clean up the incorrect Law and legislation subdivisions in the FAST database.

- Our MAC liaison is a voting member of the committee that is working to develop standards for the MARC replacement, BIBFRAME. The Committee has considered and approved dozens of changes to the various MARC formats, many of which are intended to facilitate the eventual migration of MARC-based data to its intended replacement, BIBFRAME. The plan to replace MARC will completely revolutionize the experience of connecting users to information and this transformation into the linked data realm will have ramifications outside of library catalogs.
 - An example of the types of items being decided is here: <https://www.loc.gov/marc/mac/list-p.html#2017>

We find there to be significant and specific examples of past contributions to law librarianship made by the liaisons in their respective roles. We can expect these sorts of definable outcomes with continued AALL representation on those committees.

Research alternative options for the program, including:

Limiting number of days spent at ALA meetings.

We explored several alternative options for the ALA liaison program. All three liaisons are under the impression that attendance at all four meetings (two at ALA and two at ALA midwinter) were mandatory.¹

CC:DA, MAC, and SAC meet consistently at the same days and times at both ALA & ALA Midwinter. The days and times are as follows:

	Saturday	Sunday	Monday
CC:DA	1:00p-5:00p		8:30a-11:30a
MAC	8:30a-11:30a	3:00p-5:30p	
SAC		8:30a-11:30a	1:00p-5:30p

The CC:DA liaison could arrive Saturday morning and leave Monday afternoon. The MAC and SAC liaisons should each arrive the day before their first meeting since their first meetings are early morning and each could leave after their second meeting.

When asked, none of the liaisons thought it likely that they could influence the scheduling of their respective meetings.

The committee finds it reasonable to limit each liaison to two night’s hotel accommodations.

Below is a chart outlining registration fees for ALA Midwinter and the ALA Conference:

¹ There is some uncertainty about this requirement. Regularly appointed members of the two ALA committees are required to attend 3 of the 4 meetings. We were unable to verify whether there are different requirements for members who serve as representatives of other organizations like AALL. Travel to both the annual and mid-year ALA meetings would still be required to meet a 3-of-4-meetings requirement.

	Early Bird Registration for ALA Member*	Conference Registration Incentive**	2 Single Day Passes
ALA Midwinter 2018 (Denver)	\$230.00		\$380.00
ALA 2018 (New Orleans)	\$305.00	-\$255.00	\$430.00
Totals for each:		\$280.00	\$810.00

In obtaining these figures, we assume the individuals attending would be both ALA members and be able to obtain early registration discounts.² These discounts include a “Conference Registration Incentive” people who attend both the ALA Conference & ALA Midwinter.³

The committee finds that there is no cost benefit to obtaining single day passes over regular registrations.

Investigate the possibility of attending the committee meetings virtually.

Work with ALA to determine more cost effective ways to encourage participation in the work of the committees by other library groups

To investigate these portions of the charge, our committee first discussed the possibility of attending the meetings virtually with the three liaisons. None of the liaisons indicated that this was a possibility within their respective groups. All expressed doubts that they could be as effective in their roles if they were virtually attending the meetings.

Our committee then contacted Marty Kurth, the Associate University Librarian for Technical Services at the Yale University Library and the Chair of the Technical Services Directors of Large Research Libraries (Big Heads) Interest Group. The group has historically held well attended informational meetings at both ALA and ALA Midwinter. We contacted Kurth because his group has some experience within ALA holding a virtual meeting.

At the 2017 ALA Midwinter, this group held a virtual meeting in lieu of its in-person meeting. This proved successful enough that the group decided to hold the 2018 Midwinter meeting again in the virtual format.

Technology and tech support for the 90 minute GoToWebinar format was provided by the Association for Library Collections & Technical Services (ALCTS) division of ALA, the parent group of the Big Heads, as well as CC:DA and SAC.

While this meeting did not conduct business, Kurth felt the format and technology would support such a venture.

² <https://2018.alamidwinter.org/registration/rates>, <https://2018.alaannual.org/registration/rates>

³ <http://www.ala.org/conferenceevents/Conference-Registration-Incentive>

Kurth suggested we follow up with Keri Cascio, executive director of ALCTS. We emailed Cascio and asked *inter alia* whether other groups are investigating virtual meetings, specifically SAC, CC:DA, or MAC.

Cascio responded that CC:DA and SAC would be difficult to have online compared to Kurth's group since the discussions tend to be more formal, intense, and extensive than one would find at an interest group. It would also be difficult to stream in-person meetings since the "equipment required, a stable internet connection, and then sometimes A/V staff assistance from a hotel or the conference center, is cost prohibitive at this time."

Cascio did not know about MAC.

Cascio also added that SAC is having a conversation about appointed committee members' current obligation to attend 3 of 4 in-person meetings per year.

While we find that virtual meetings may be a possibility for the future, they are not currently a possibility. With regard to working with ALA, our communication with Keri Cascio leads us to believe there may be a possibility of a reduction of in-person meeting requirements and an increase of remote interaction to do committee work.

Consider using local members in lieu of official liaisons

The committee asked the current liaison to MAC about this possibility the following is their response:

Sending different liaisons throughout the three year term would be not as effective as having a single liaison assigned to attend all the meetings of the committee during the three years, because the manner in which MAC conducts its business requires continuity from meeting to meeting. In other words, issues that are initiated at one meeting are usually followed up on and resolved (usually by voting) at a subsequent meeting or meetings. If the liaison was not present at the meeting where the issue first presented itself, it's harder for him/her to understand all the ramifications and concerns surrounding it in order to cast an informed vote. Also, each of the committees to which we used to send reps has its own particular protocol and things work more smoothly if the rep has a clear understanding of what the protocol is. Most of the people I see on the MAC committee have been on it for years and years.

One of the individual members offered this on the subject:

The liaisons are deeply involved in substantive decisions that affect cataloging standards used by all libraries. The liaisons' status as official AALL representatives is critical to this work. Having been involved in both AALL and ALA, it is clear to me that having a formal liaison who can credibly and consistently represent the position of the law library community on these committees is much more valuable and effective than having law librarians attend ALA without that status. A typical ALA Annual Conference attracts between 17,000 and 26,000 attendees, and most meetings at the conference are open. It is

critical that these liaisons are seen by our peers in ALA as our official representatives, and not as local attendees who happen to have wandered into a meeting.

The committee finds that having a single liaison for a three year term in each position outweighs the cost savings of utilizing different local members to sit on these committees from year to year.

RECOMMENDATIONS

In the short term:

AALL should provide interim support to the liaisons to CC:DA, SAC, and MAC until a more permanent solution is provided. AALL should not be obligated to refund money already donated for such support. The support per liaison should be limited to:

- Airfare.
- Four nights hotel accommodations (two for ALA & two for ALA Midwinter).
- Reimbursement for meals & incidentals.⁴
- Early conference registration including the Conference Registration Incentive Discount for registration at both conferences.

Whenever possible liaisons should economize by sharing hotel rooms and utilizing the travel agent normally used by AALL to obtain discounts on travel and accommodations.

In order to increase the value and visibility of their work to all AALL members, liaisons should be required to prepare simplified versions of their reports to better educate AALL members unfamiliar with cataloging, in addition to the reports currently produced.

In the long term:

With approximately 4,100 paid members, the cost per member at the \$9,000/per year funding level is approximately \$2.20/per member. The AALL Executive board should propose a \$2.20 increase in membership dues explicitly tied to the funding of the travel expenses for the liaisons to CC:DA, MAC, and SAC.

The amount should be revisited every three years and be adjusted to reflect the actual cost of these three liaison positions.

This proposal should be submitted directly to the membership of AALL for approval through the distributed ballot provisions under Article XII, Section 2 of the AALL Bylaws.

Liaisons should be encouraged to support measures within their respective committees that would reduce the amount of travel required if such measures would not compromise that liaison's ability to participate meaningfully in the work of the committee.

⁴ Limited to ½ of the rate listed here: <https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-lookup>