# POTOMAC
# TECHNICAL
# PROCESSING
# LIBRARIANS

*A regional affiliate of ALCTS*

*ANNOUNCING*
# POTOMAC TECHNICAL PROCESSING LIBRARIANS
## 90th ANNUAL MEETING
October 17, 2014
8:30 a.m. – 3:30 p.m.
Miller Senate Office Building
11 Bladen Street
Annapolis, MD 21401

# REIMAGINING TECHNICAL SERVICES:
## Redesigning workflows, rethinking resources, reworking spaces, and reorganizing staff

## Speakers
*Creating Transformational Change in Technical Services*
**Christine Dulaney**
Head, Technical Services
American University

*Moving from Print-Centric to e-Centric Workflows: a Reorganization of the Technical Services Group at Mason Libraries*
**Meg Manahan,** Director, Technical Services, George Mason University
and
**Nathan Putnam,** Head, Metadata Services, University of Maryland, College Park

*The New Face of Technical Services: Opportunities and Challenges in the Cloud*
**Denise Branch,** Head, Continuing Resources, Virginia Commonwealth University

*Cataloging-in-Publication: Moving Beyond the Print*
**Camilla Williams,** CIP Program Specialist, Library of Congress
and
**Caroline Saccucci,** Program Manager, Dewey Section & Acting Program Manager, Literature Section, Library of Congress

For registration and other conference information, visit the PTPL website:
http://potomactechlibrarians.org/events

# PTPL 90th Annual Meeting Schedule

08:30 - 09:30    **Registration and Continental Breakfast**
09:30 - 09:40    **Welcome – Linda Geisler,** PTPL Chair
09:40 - 10:00    **Christine Dulaney:** Keynote Presentation
10:00 - 10:15    **Break**
10:15 - 11:15    **Meg Manahan and Nathan Putnam:** Moving from Print-Centric to e-Centric
                 Workflows: a Reorganization of the Technical Services Group at Mason Libraries
11:15 - 11:30    **Q&A**
11:30 - 12:00    **Business Meeting,** Linda Geisler**, and Historical Moment,** Mimi Games
12:00 - 01:30    **Lunch**
01:30 - 02:15    **Denise Branch:** The New Face of Technical Services:  Opportunities and Challenges
                  in the Cloud
02:15 - 02:30    **Q&A**
02:30 - 02:45    **Break**
02:45 - 03:15    **Camilla Williams and Caroline Saccucci:** Cataloging-in-Publication: Moving Beyond
                 the Print
03:15 - 03:30    **Q&A**
03:30 - 03:40    **Passing of the gavel and wrap-up**
03:40 - 04:30    **Optional Senate Building Tour**

**Registration fee includes PTPL membership, conference, continental breakfast, and lunch.**


**Parking and Transportation**

[Printable transportation and parking directions are available on our website.](#)

The Miller Senate Office Building is located at [11 Bladen Street, Annapolis, MD 21401](#).

We strongly recommend that you park at the Navy Marine Corps Memorial Stadium and take the State Shuttle to the Miller Senate Office Building. The [Navy Marine Corps Memorial Stadium](#) is located at 550 Taylor Avenue, Annapolis, MD 21401. Parking costs $5.00 per day and cash, Visa, and MasterCard payments are accepted.

The State Shuttle picks up from the Navy Marine Corps Memorial Stadium every 20 minutes and will drop off at the Maryland State House on College Avenue, across the street from the Miller Senate Office Building. The State Shuttle costs $2.00 each way (cash only). Maryland state employees can ride for free by showing their state ID. Tell the driver of your destination to be sure that you get off at the right stop.

For downtown parking options, see [Park Annapolis](#).


**Name Tags**

Pre-printed name tags are available at the entrance to the conference area. Please let us know if there are any errors with your name tag. We ask that you return your name tag to us as you leave the meeting so that the plastic holders might be recycled.

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## PTPL Advisory Board
## Slate of Candidates for 2014/2015 Term

*Executive Committee*

**Vice Chair/Chair-Elect**
Tiffany Wilson
UMBC

**Treasurer**
Linda Wirth
Retired Serials Cataloger

*Regional Representatives*

**District of Columbia**
Mimi Games
Washington College of Law

**Maryland**
Lynda Aldana
UMBC

**Virginia**
Jing Zhong
George Washington
    University

**Chris Zammarelli**
U.S. Department of State

**Betty Landesman**
University of Baltimore

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## CURRENT PTPL Advisory Board

*Executive Committee*

**Chair**
Linda Geisler
Library of Congress

**Vice Chair/Chair-Elect**
Mark Winek
Georgetown University

**Past Chair**
Mimi Games
Washington College of Law

**Secretary**
Sue Neilson
American University, *Emerita*

**Treasurer**
Linda Wirth
Retired Serials Cataloger

*Regional Representatives*

**District of Columbia**
Polly Khater
Smithsonian Libraries

**Maryland**
Tiffany Wilson
UMBC

**Virginia**
Amy O'Connor**
Library of Virginia

**Vani Murthy**
Georgetown University

**Mark Hemhauser **
University of Maryland
    College Park

**Denise Branch**
Virginia Commonwealth
    University

**Term continues through 2014/2015

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# Speaker Biographies

*Christine Dulaney : Creating Transformational Change in Technical Services*

Christine Dulaney is the Director of Technical Services at the American University Bender Library. Prior to her appointment at Bender, Christine held positions as Head of Technical and Metadata Services at American University's Washington College of Law, Head of the Knowledge Management Asset Group at the Congressional Research Service of the Library of Congress, as well as Head of Technical Services at Catholic University Law Library and Head of Acquisitions and Serials at George Washington University Law Library.

In addition, Christine has published and presented at conferences on the topic of managing technical services as well as implementation of discovery layers. An active member the American Library Association, Christine serves on several committees including the ALA Committee on Rsearch and Statistics, ALA Advisory Board to American Libraries and the ALCTS International Relations Committee.

*Meghan Manahan and Nathan Putnam : Moving from Print-Centric to e-Centric Workflows: a Reorganization of the Technical Services Group at Mason Libraries*

*Meghan Manahan*

Meg Manahan is the Director of Technical Services at George Mason University in Fairfax, Virginia, and oversees the acquisitions, metadata, e-resources, payments, and gifts functions for the Libraries. Her professional interests include organizational development and change management in libraries.

*Nathan Putnam*

Nathan Putnam is the Head of Metadata Services at the University of Maryland in College Park, Maryland, and manages many of the cataloging and metadata operations for the University Libraries. In addition to this, he is an adjunct professor for the University of Maryland iSchool, where he is currently teaching a class on creating information infrastructures.

*Denise Branch : The New Face of Technical Services: Opportunities and Challenges in the Cloud*

After Denise Branch completed her BS degree in Business Administration from VCU, she thought she was bound for the business world. Instead she was launched into the exciting world of libraries. She attended Catholic University to get her MSLIS. Working in both public and university libraries she has checked out books, cataloged items, acquired materials, provided reference services, resolved users' access problems, negotiated licenses and performed workflows in the cloud. Her career has taken her from circulation, reference, cataloging and acquisitions to her current destination where she has been happily managing serials since 1989.

For the past 25 years she has had the thrilling responsibility of managing the Serials Unit at Virginia Commonwealth University where the Unit is adapting to new processes and taking on challenging projects. She has experienced the migration from ALIS to NOTIS to Aleph to Alma and the shift from print to electronic; integrated new technologies; developed efficient workflows; updated URLs; verified electronic access; maintained link resolvers; collaborated with publishers and subscription agents; witnessed numerous reorganizations. She and her staff started out with kardex cards and are now fully engaged in learning the cloud-based Alma system for e-serial management.

The journey has been enjoyable. In April 2013 the Serials Unit of the Acquisitions Department merged with the Cataloging Department to form the Metadata and Discovery Department. There have been many challenges and lots of opportunities to implement new strategies, initiate collaboration and streamline workflows in e-resource management.

For more information, see http://www.library.vcu.edu/about/staff/branch-denise.html.

*Caroline Saccucci and Camilla Williams : Cataloging-in-Publication: Moving Beyond the Print*

*Caroline Saccucci*
Dewey Program Manager
Acting Literature Program Manager
U.S. Programs, Law, and Literature Division
Acquisitions and Bibliographic Access Directorate
Library of Congress

Caroline Saccucci is the Dewey Program Manager in the U.S. and Publisher Liaison Division at the Library of Congress.  Her primary responsibilities include managing a staff of Dewey classifiers and overseeing the application of the Dewey Decimal Classification to bibliographic records created at the Library of Congress.  She serves as the LC liaison to the Dewey Decimal Classification Editorial Policy Committee.  She is also currently the Acting Literature Program Manager where she manages the Children's and Young Adults' Cataloging Program and the metadata creation for works of English belles lettres primarily by English and American authors, literary criticism, juvenile fiction, bibliography, and library and information science received via the Copyright Office and the Cataloging-in-Publication Program. Caroline was formerly a CIP program specialist, where she had primary responsibility for all cataloging issues related to the CIP Program, including queries from catalogers and publishers, as well as participating in new metadata initiatives.  She also served as the primary point of contact for libraries and institutions in the ECIP Cataloging Partnership Program.  Prior to working with the CIP Program, she was a senior cataloging specialist in the Geography, Political Science, and Education Section of the U.S. General Division.  Caroline is an active member of the American Library Association (ALA) and currently serves as the Chair of the ALCTS Public Libraries Technical Services Interest Group.  Caroline has a B.A. in History from Longwood University and a Master's in Library Science from Simmons College.

*Camilla Williams*
Cataloging-in-Publication Program
Library of Congress

 Camilla Williams is a Program Specialist in the Cataloging-in-Publication (CIP) Program of the U.S. Programs, Law, and Literature Division at the Library of Congress (LC). Her responsibilities include responding to inquiries from publishers and cataloging staff, recruiting and training new libraries and institutions to the ECIP Cataloging Partnership Program, and participating in new automated and metadata initiatives. She serves as the primary point of contact for the CIP E-books Program, a new initiative in which the CIP Program receives electronic books in addition to the print books in exchange for bibliographic metadata. Camilla regularly gives presentations and updates about the CIP Program to the CIP Advisory Group (CAG) and at the LC booth during the American Library Association (ALA) annual conferences.

# Scholarship Recipients

*Rebecca Reeves*

Becca is a part-time student in the University of Maryland's MLS program and expects to graduate in December 2015.  She currently serves as Resource Description Manager at the American University Library, supervising Cataloging Services unit staff and doing original cataloging. Prior to this, as the AU Library's ETD Coordinator, she established a new process for electronic submission and management of the university's theses and dissertations and worked with staff across the university to manage the transition to the new workflow. Becca holds a B.A. in English and Women's Studies from Dickinson College, where she somehow managed to get away with writing her senior thesis on Buffy the Vampire Slayer instead of Alexander Pope. In her spare time, she volunteers at the C. Burr Artz Library in Frederick, Maryland, indexing genealogy-related publications. She also likes to run, swim and read the occasional book.

*Alexander Salopek*

Alexander T. Salopek graduated with an A.B. in Philosophy from the University of Chicago in 2008.  He currently is pursuing his Masters of Library Science from University of Illinois; he expects to graduate in 2015. Alexander has held positions at the University of Chicago Map Library, Joseph Regenstein Library, The Center for Research Libraries, and at Government Printing Office.  He currently works for the Supreme Court of the United States Library as the Acquisitions/Government Document Technician, where he spends his days keeping the library's collection up to date as well as staying on top of Document shipments. He serves on the library's eBooks and tablet team. Alexander is also an Intern at the Sister Helen Sheehan Library at Trinity Washington University where he provides night and weekend reference, supervises student workers, and has been actively engaged in collection development projects and information literacy initiatives.

# Advisory Board Candidates for Maryland

*Lynda Aldana*

Since March 2009, Lynda Aldana has been the Head of Technical Services in the Albin O. Kuhn Library & Gallery at the University of Maryland, Baltimore County (UMBC); she is also Head of Library IT Services since July 2012.  Previous positions include Coordinator for the Cataloging Department at the Milton S.Eisenhower Library at Johns Hopkins University and Cataloging Librarian in the J. D. Williams Library at the University of Mississippi.  She attended the University of North Texas for her master's degree in library science and has an undergraduate degree in bassoon performance from the University of Southern Mississippi.  She is active with different groups in the USMAI consortium including the USMAI DDA Implementation Group, as well as in ALA, where she has served on various committees within LLAMA and ALCTS.  Since moving to Maryland, she has had the opportunity to attend many wonderful, informative PTPL programs and meetings, and she would welcome the chance to give back to the organization by serving as a member of the board.

*Betty Landesman*

Betty Landesman has been in the position of Head of Technical Services and Content Management at the University of Baltimore's Langsdale Library since July 2012.  She has held prior positions in cataloging/metadata, electronic resources management, serials management, reference, and systems at the NIH Library, the University of the District of Columbia, and the George Washington University's Gelman Library since moving to Washington in 1988.  She is co-chair of the Content and Collection Development Topic Committee of the National Information Standards Organization (NISO) and is active in ALA ALCTS, currently chairing the Continuing Resources Section Standards Committee and the Collection Management Section Education Committee.  In addition to her M.L.S. from Simmons College, she holds an M.A. in French from Harvard University and an M.S. in Information Systems from GW's School of Business and Public Management.  She feels that her diverse work experience reflects the changing and broadening nature of "technical services" reflected by PTPL's consideration of a name change.

Potomac Technical Processing Librarians
90th Annual Meeting
Friday, October 17, 2014, 11:30 a.m.-12:00 p.m.
Miller Senate Office Building
Annapolis, MD
West Conference Room

## Business Meeting Agenda

1. Opening of Meeting

2. Approval of 2013 Annual Meeting minutes

3. Treasurer's Report

4. Conferring of Awards
    a. Academic scholarships

5. Historical moment

6. Call for archival material
    a. Particularly 2003-Present

7. Election of new Advisory Council officers

8. New business
    a. Change in PTPL logo and name

9. Adjournment

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*Friday, October 17, 2014*
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## Report of the Treasurer
October 2013 – October 2014

### Checking Account Balance

| | |
|---|---|
| October 2013 | $12,782.00 |
| October 2014 | $18,355.84 |

### Scholarships                          $ 2,000.00

### Annual Meeting 2014

| | |
|---|---|
| Receipts (incl. Memberships) | $ 11,164.85 |
| Expenses | $   6,532.61 |
| Difference | $ +4,632.24 |

*Respectfully Submitted:*

*Linda Wirth*
*PTPL Treasurer*

Potomac Technical Processing Librarians
89th Annual Meeting
*e-Books: Lifecycle Management and Workflows*
October 11, 2013, 9:00 a.m. – 4:10 p.m.
George Mason University
The Mason Inn Conference Center & Hotel
Fairfax, VA 22030

Joyce Tenney started off the 89th Annual PTPL meeting on e-Books: Lifecycle Management and Workflows with introductions about the speakers and the topic.

### Barbara Anderson: "In the Beginning … (there was netLibrary)"

Ms. Anderson began her topic giving background information about Virginia Commonwealth University campus and libraries. VCU libraries starting collecting e-books in 2000/2001 for the following reasons: space a premium; no need to label, bind, repair, or shelve; supported growing distance education programs; 24/7 access; and it was cost effective. During this time they were working with Solinet which was offering shared collections of eBooks held in NetLibrary. In order to catalog these eBooks, it helped that technology was quickly advancing, they had LC's MARCMaker and MARCBreaker to help with editing, they had NOTIS GTO record loader to batch load, they learned about Perl scripts to help with editing records, and also had attitude changes about the whole process. From NetLibrary they retrieved files with pretty good MARC records via OCLC, and then manipulated the files, then loaded the files. The also counted records, had the OCLC holding symbol set automatically, which all ended up being an adventure in cataloging for them. So it was all a very new and good system at that time. FY2001: eBooks added 13K print: 30K eBooks. FY2013, 45K eBooks and 24K print books. This high volume of eBooks creates metadata madness. All the various eBook vendors provided different types of records, not all of the cataloging was good, or the MARC records were good but were without OCLC record numbers, or there were unacceptable MARC records, or there was not any MARC arrangement with OCLC to set holdings automatically unless you purchase the OCLC record sets. Sometimes, there is no notification of MARC records to add or there was notifications to add MARC records. It varies with each vendor. Process equals variations on a theme: get the records, attach holdings symbol to OCLC records, manipulate the records, load the records, count the records. So they thought why bother manipulating metadata? It's all about the discovery. Growing percentage of eBooks vs. print books in the collection. Shelf browsing became increasingly irrelevant. Increased reliance on public interface to integrate eBook and physical book metadata. Importance of metadata to differentiate between eBook and print book. Discovery downside includes duplication of titles among packages, multiple records WorldCat, multiple records in local catalog, so all of this created chaos and too many records.

Then PCC came along: vendor supplied records never incorporated 856 fields for their competitors. Attempts to set holdings in OCLC frequently reveal holdings already set(from other vendor packages); OCLC records frequently include 856 fields for providers not relevant to local needs; Rely on system loaders to discover duplicates and apply increasingly intricate merge routines; Ongoing maintenance cleanup of non-provider neutral records already in local catalog. How do you then go about removing eBooks, or adding new platforms, or

systems, when the eBooks are in there already? Along with keeping up with how eBooks are changing from downloading capabilities to system based viewing.

VCU had to clean up hundreds of thousands of records that have 856 fields, since when they transitioned from Aleph to Alma they had to change how users could obtain the eBook. Barbara Anderson suggested really looking into how you are using the 856 field today and the language you have selected and how these records could be affected in new ILS systems such as Alma. They attach call numbers to eBooks so users have titles cataloged together and users can see everything that the library holds. To add OCLC holdings for the eBooks their ILL department did not agree with following this procedure. However, the Public Services department said there are those who don't go through traditional catalogs and only use OCLC which meant VCU kept adding their holdings. WorldCat Metadata Collection Manager is something on the horizon that will help with the maintenance of eBook holdings and WorldCat holdings, MARC records and reports. Alma-provides a community zone that is paired with your local catalog information. So you can find a local bibliographic record that would link to the community zone and you wouldn't have to worry about updating records b/c that is all done in the community zone. It is a vendor neutral eBook record collection that supports one platform of eBooks and is in charge of updating the platform.

### Elizabeth Kupke: Improved Workflows for the Management, Accessibility, and Discovery of E-Books

Ms. Kupke started out giving a background of the eBook collection at Georgetown University and how they have over one million eBooks and they use GOBI for individual eBooks. They use Serials Solutions ERM for eBook collections, recently migrated to Sierra to use as their ILS, and they do not have a PDA/DDA implemented.

Elizabeth Kupke described how their print materials budget is decreasing and their eBooks collection budget is increasing. She highlights how eBooks format is different from what the originally were. There is a new stream of processing and way of handling these types of new materials and new languages that have to be adopted. Things like DDM or Adobe Digital are allowing these eBooks to be viewed on a tablet or smartphone. EBooks require attention care and maintenance. EBooks require the ability to adjust to change. The decisions you have to make at the point of acquisitions include having to consider different models, users limits, publish versus aggregate, owned or leased. There is no cut and dry way of selecting, it comes down to the type of user, the type of platform, the subject area, and you will need to set up guidelines to decide on selection. So Georgetown went with purchasing from publishers for licensing rights, but like the aggregators, which provides a way of searching for print and electronic. Loading eBook MARC records, tracking what has been uploaded, adding the 710 field used to identify collections useful for running lists later and added the 856 field to link to information on viewing the eBook. If you add the 710 it will make things easier when running reports for what is available under one collection. Serials Solutions Management reports details a list of databases, broken down by how many resources of a certain format are in each database. Finding duplicates, once you get a report from Serials Solutions can help you determine those collections that are currently being uploaded into your catalog using the 360 MARC Service. Filter out zero title databases to determine those collections that do not get loaded by 360Marc. Vendor supplied records are needed. Georgetown has an eBooks LibGuide to show users how to search for eBooks, the types of collections, how to download and use eBooks. Since nobody has the same mobile device so they provide training for users with a variety of devices but not only for general library users but also for

librarians and library professional staff. They will have a "bring your own device" training day and the librarians will provide training to the staff so the staff will then know how to help users.

How to make eBooks discoverable:

Put them in the catalog

Provide instructions on accessibility to prevent user frustration

Add links to collections

Use a widget

Anticipate system downtimes

Browsing eBooks:

You can add eBook widgets displayed around the library and library catalog that displays the eBook cover and provides browsing capabilities.

E-resources alerts-systems used to notify downtimes, new editions, new publications. Georgetown has an e-resources blog about anything about problems with eBooks, or if a system is down, if there are new platforms or publications or editions everything and any new information about eBooks goes on the eBook blog.

Go to [www.library.georgetown.edu](www.library.georgetown.edu) then under research, then under course guides there is a link for the eBook LibGuide.


## Business Meeting:

2012 Annual Minutes Approval-Minutes approved without changes

Treasurer's report:

Running into higher costs with fewer free resources. PTPL is asking that if the organization is hosting a workshop to please volunteer a spot that is free or low in cost or even for next year's annual conference. Treasurer's report was approved.

Conferring Awards:

Academic scholarship: Sue Graves-the award winner. Mimi Games read the bio about Sue Graves-Mimi Games presented Sue with their scholarship award money and certificate.

Career Achievement award: Mimi gave a brief description about the award: Paulette, gave a speech about Jim Gwin. This award was made posthumously and Jim's family accepted the plaque in his behalf.

Call for Archival material-PTPL has a repository at Catholic University of America-Mimi Games noticed upon viewing the archives that a lot of materials are missing. So PTPL is asking members to send any kind of workshop flyers, annual conference flyers or anything that should be added to the PTPL archives to please contact Linda Wirth.

New advisory council was elected without any objections

New Business: Logo change- Tiffany Wilson will design a couple of different logos to have the membership vote on. If there are any suggestions in changing the name of PTPL to please submit those to the PTPL Board.


**Tiffany Wilson: Demand-Driven Access: Shifting into Gear, Avoiding Roadblocks, and Keeping Traffic Moving**

A new take on an old idea, bringing resources to library users. Its bringing resources to users with regards to what they want, when they want it, and to where ever they want it.

What is DDA (Demand Driven Acquisitions) this has been available in print versions with ILL or the need based on ILL requests. The e-model is a bit different based on the companies involved and pricing. You have a use to a large number of eBooks. You load records into your catalog. They show up as regular eBooks. As patrons use the eBooks there are "triggers" such as printing, downloading, how long you have the eBook open, etc. that tallies until it reaches a limit where the library is obligated to buy the eBook. You pay for what you use when you use it. You aren't spending money on things nobody uses, you don't have to waste time analyzing if something is being used, and you are saving time and money.

Tiffany works for USMAI and gives a bit of background about the University. The DDA programs they have are through EBSCO and EBL. DDA works differently for individual libraries versus consortium. So the UM Consortium was limited in what type of DDA program they could get because not all work with consortiums.

Planning and implementation takes the most time and the most decision making. There is a lot of waiting around and seeing how things will go through with licensing, the negotiation, etc. Picking a vendor such as EBSCO, EBL, eBrary, JSTOR, MyiLibrary include a lot of factors to consider such as the types of terms and conditions they require, pricing, licensing. This can be even more cumbersome if you are in a consortium. Until these programs can show publishers that they will make money from this type of eBook platform, there will be limitations in size and scope of eBooks.

Whose job is it?

Central responsibility versus diverse responsibility- how does a centralized body receive info from other parties, who makes decisions, who gets the technical information, and so forth. There are a lot of decisions to be made before even deciding who does what.

Profiling/Selecting is something that goes through liaisons, reference librarians, directors, collection development. Who is going to fill out the profile documentations stating the coverage, what kind of subject areas, and from what publishers. But the other decision is whether you then you want a narrow collection. Do you want a DDA only in a certain subject area? If you have a narrow scope who is going to be in charge and if you have a broad scope you probably will have multiple people giving input. You will need to decide if you have the book in print too, what will you do with duplications, what are your deduping policies. In terms of consortia how do you meet the needs of larger institutions versus smaller institutions?

With regards to licensing there is a lot of back and forth. Are you taking licensing from the vendors, does your institution have strict licensing rules. If you are with a consortium you have to decide who is handling the licensing, does the vendor require one institution to step forward, or will they accept the consortium as a whole to work with. You will need to look into

ILL and how you will handle that. You will need to negotiate how many users can use the eBook at one time, if the eBook can only be viewed online, and whether it can be downloaded and to what devices?

Money issues include, are you going to pay as you go or set up a deposit account? What does your vendor require? How is the money allocated and where is the money allocated? Is there a central plot or will it be billed to different departments? Some of this will be limited based on staffing and your departments. In regards to consortium does each school contribute based on size, based on use/need, and who will participate?

As for access, you will need to know who can download, to where, how it will be viewed, and how many users. How will the eBook that is checked out be displayed? If a book is unavailable do you send automated notices when the eBook is available? Where do you get the records to add to the catalog? Who adds those records? Will it be the Systems Librarian, or the Cataloger, or the Electronic Resources Librarian? In a consortium how do you deal with different systems, which school will add the records?

Technology – authentication and proxy and virtual servers. Whose job is that or do you have to coordinate with major universities? How do you authenticate if you don't have a single sign on. Who do you want accessing the eBooks, do you want to block from public use b/c would you end up buying this book for the public rather than your paying users? How do you handle adding with your link resolver.

Troubleshooting with eBooks is a major function. You need to check the proxy side, you need to check the single user, and there could be access issues on the vendor side. There could be link issues and who will be in charge of handling all of this trouble shooting? Within consortiums who will handle the troubleshooting?

Vendor Contact: who contacts the vendors? Do multiple people contact the vendors? Do you need to have a chain reaction of who can be involved with contacting the vendors?

Update schedule-you only want coverage from certain time period. Do you want monthly updates, do you want automatic updates, or do you want some control over it? How do you want handle deletions, such as do you want monthly deletions? How often do you want updating.

You also will need to set up an evaluation schedule since you really need to evaluate how it is all working. Are any of the titles being accessed? Are there certain titles that are being used more than others? Are things being used too much so you might want to change it from the DDA process to the selection process? You will need to decide who will evaluate these resources. You will want feedback from usage stats, the public, the reference librarians, and the invoices.

Technology-how is your ILS going to work with these records, how is your discovery layer going to work with this plan, how will this affecting billing, will you need to work with the campus system, will this affect authentication. You will need to see how all of systems are being used with the acquisition process and who handles what.

Access & Discovery-how do you want these eBooks to be discovered? Do you want to say they are DDA or EBSCO eBooks? How do you they show up in discovery layers? Are you stuck with what the vendor gives you even though the eBook doesn't show up well?

You will also need to think about the web presence. How do you want to publicize these eBooks? Do you want to explain what a DDA plan is?

Finally there is the Implementation:

Hard or soft launching

Information sharing-you need to explain what these DDA titles are, how they are purchased, how they are used, who is managing all the aspects of the DDA. Your staff needs to be updated about these titles

Initial troubleshoot-you need to do some of this in the beginning

Communication: you will need to communicate within the library. You need to standardize your information and everyone who needs to know it will know it.

Troubleshooting if things are going wrong you will need to communicate with the vendors.

Inflexibility- you need to see if vendors will make changes for you, if the DDA is not working and you've tried all avenues you might need to just drop the DDA.

You will need to continuously go through the process of:

Additions and deletions

Work with vendor relations

Troubleshoot

Deal with technical issues

Implement an automated link checking system

Information sharing

Then make improvements based on public feedback


**Vendor Panelists: Robert Boissy (Springer); Jason Philips (ITHAKA: JSTOR, Portico); Melanie Schaffner (Project MUSE); Mark Hyer (ProQuest: ebrary, EBL)**


Question 1: What have been the biggest issues or problems you've encountered with publishers, and how does that affect your business practices?


Schaffner: Working with different size/levels of publishers; educating publishers about libraries' needs including different types of books and pricing tiers; getting quality metadata from publishers that will address MUSE's administration need, as well as meeting libraries' needs; assuring that publishers deliver according to agreements.

Boissy: Struggled at first with creating quality MARC records; working to support record creation and loading for special libraries and institutions with no in-house technical services; trying to figure out appropriate ways to collaborate on marketing and user education to get better ROI; working with libraries that don't like Springer's business model.

Mark Hyer: Negotiating deals for the Boston Library Consortium; interviewing every publisher as part of the fact-finding process; working with external vendors like YBP; aligning the needs of four discreet parties--publishers, libraries, external vendors, and ProQuest; helping publishers to accurately see their market position; working with wide range of publisher models for multiple users and digital rights management.

Philips: Evaluating the sustainability of publishers' business models; helping publishers at the macro level to transition from exclusively print to electronic only or a hybrid model; educate publishers regarding end-user and library needs; finding a middle ground between publishers and libraries.

Question 2: How do you work with bibliographic utilities and discovery tools to meet the metadata needs of different libraries?

Philips: Actively struggling with metadata issues, especially when publishers aren't reliably providing accurate information; partnered with OCLC to improve metadata services; need to establish ways to provide metadata to discovery partners; examining Google crawl opportunities.

Mark Hyer: Aiming for interoperability; all eBooks are fully indexed; working with OCLC for MARC records, ensuring that all records contain OCLC numbers; metadata is not available through non-ProQuest discovery platforms; working on ISBN cleanup projects.

Boissy: Springer places no limits on metadata sharing; providing discovery review analytics to discern how users are getting to Springer link titles; metadata works equally with all discovery tools; MARC records are free from Springer with no OCLC numbers; OCLC records are available for free delivery directly from OCLC; will work towards KBART compliance; working to transition to RDA compliance; exploring working with OCLC WMS.

Schaffner: Dealing with the same issue as the other panelists; making use of previously established relationships established with journal products; negotiating information sharing took longer than actually getting said information; always looking for partners in working with local or specialized discovery systems; trying to meet the needs of the different markets.

Question 3: How do you work with librarians to improve interfaces and services?

Boissy: Sales staff maintains relationships with clients after they make purchases; keep librarians on staff--more publishers are hiring librarians to work with librarians clients; maintains discovery services liaison; they investigate different systems in house; provide reports to consortia.

Mark Hyer: Launching updated EBL and ebrary interfaces for next year; developments led by librarians and focus groups; hire people who have the knowledge needed for specific projects; working on workflow assistance for clients.

Philips: Updated interface as needs became more complex—based on different formats— relying on user testing/publisher input/libraries to appropriately evolve the products; working to keep user experience  intuitive and easy to use; trying to incorporate "Google-like" experience; proactively tracking and providing statistics for librarians that libraries can't necessarily track easily.

Schaffner: MUSE keeps librarians on staff in different capacities; customer feedback is heard immediately due to the small size of the organization; external librarians participate in two advisory boards; focuses on meeting clients and users face to face at conferences and events; works with different partners, including Lyrasis; conducts research into usage patterns and discovery.

Question 4: What direction do you see e-books going in the next few years?

Mark Hyer: Potential for a book renaissance with different models; personalization of eBooks for academic audiences--bookshelf, annotation, etc.—more like direct to consumer models; different types of consortia collaborations.

Philips: print to digital transition; no print front list? Discovery of backfile; how will discovery affect scholarship, changing habits of users? How will this affect sales of print books? (increase as older books are discovered?) notion of "book"? user habits/needs will evolve things

Schaffner: More models and flexibility; libraries using usage statistics, research, and access to different models to spend their money more effectively; exposing small press and university press content to wider audiences has the potential to change academic writing; possibilities to leverage authors' content in different ways.

Boissy: Personal eBooks have a higher risk of disappearing, contrary to libraries' electronic collections with preservation plans; younger generation adept with some technology, but still uses print textbooks, because e-textbooks don't work the way students need them to yet; adjusting to the idea of being a serious researcher using just an iPad; eBooks' potential to bring a new type of reader to the market; unpredictable changes in usage (usage of chapters increased when Springer made whole books downloadable).

Q&A session brought up issues dealing with a variety of topics, including: constantly looking for middle ground between publishers and librarians; publishers have to learn to deal with loss of control and to see the upside; trying to learn to coordinate with consortia; how to "stand up for libraries and stand up for publishers"; can be easier to work with publishers who already have journal programs; using data from libraries as a negotiating chip with publishers.

The meeting was adjourned with Mimi Games passing the gavel.

Respectfully Submitted,

Amy O'Connor, Secretary