



*A regional affiliate of ALCTS*

**ANNOUNCING**

**POTOMAC TECHNICAL PROCESSING LIBRARIANS  
92nd ANNUAL MEETING**

**BIBFRAME**

October 21, 2016

10:00 a.m. – 3:30 p.m.

University of Richmond, Virginia

Jepson Alumni Center

49 Crenshaw Way

Richmond, VA 23173

*Speakers*

***BIBFRAME: History, Overview, Progression***

**Beacher Wiggins**

*Keynote Speaker*

Library of Congress

**BIBFLOW: A Roadmap for BIBFRAME Implementation**

**Xiaoli Li**

University of California, Davis

**BIBFRAME in Action: BIBFRAME Records, What They Are,  
How To Create Them, and More**

**Paul Frank and Kirk Hess**

Library of Congress

**BIBFRAME from a Cooperative Program Perspective**

**Tina Shrader**

National Library of Medicine

For registration and other conference information, visit the PTPL website:

<http://potomactechlibrarians.org/events>

## **PTPL 92st Annual Meeting Schedule**

09:00 – 09:55	Registration and Continental Breakfast
09:55 – 10:00	Welcome and Speaker Introduction – Tiffany Wilson, PTPL Chair
10:00 – 11:00	Keynote Presentation – Beacher Wiggins
11:00 – 12:00	Xiaoli Li (including 15 min. Q&A)
12:00 – 01:00	Lunch
01:00 – 02:00	Paul Frank and Kirk Hess (including 15 min. Q&A)
02:00 – 03:00	Tina Shrader (including 15 min. Q&A)
03:00 – 03:30	Business Meeting and passing of the gavel

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

### **Accommodations:**

A block of rooms at the Embassy Suites by Hilton Richmond has been reserved for the PTPL Annual meeting attendees.

The room rate is: \$139.00 + 18.49 (tax) = \$157.49

Mention the PTPL Conference University of Richmond School of Law for the discount

The deadline to reserve a room with the PTPL room rate is October 5, 2016

Embassy Suites by Hilton Richmond  
2925 Emerywood Parkway,  
Richmond, VA 23294  
Phone / Reservations: 1-804-672-8585  
Fax: 1-804-672-3749

<http://embassysuites3.hilton.com/en/hotels/virginia/embassy-suites-by-hilton-richmond-RICDNES/index.html>

### **Parking, Shuttle Service from Embassy Suites, and Transportation**

Please see the following for transportation to the University of Richmond:

<http://www.richmond.edu/visit/index.html>

<http://www.richmond.edu/visit/directions.html>

A limited amount of complimentary parking is available immediately adjacent to the Jepson Alumni Center however carpooling is always encouraged.

For PTPL members who are staying at the Embassy Suites by Hilton Richmond Hotel there will be a shuttle service to and from the conference venue.

Morning pickups – 9:00 AM and 9:30 AM

Afternoon pickup – 3:45 PM.

### **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.



**PTPL Advisory Board  
Slate of Candidates for 2016/2017 Term**

***Executive Committee***

**Chair-Elect**

**Lynda Aldana**  
University of Maryland,  
Baltimore County

**Treasurer**

**Linda Wirth**

***Regional Representatives***

**Washington D.C.**

**Mimi Games**  
American University  
Washington College of Law

**Virginia**

**Kimberly Edwards**  
George Mason University

**Maryland**

**Joyce Tenney**  
University of Maryland,  
Baltimore County



**Current PTPL Advisory Board**

***Executive Committee***

**Chair**

**Tiffany Wilson**  
University of Maryland,  
Baltimore County

**Chair-Elect**

**Karl Debus-López**  
Library of Congress

**Past-Chair**

**Mark Winek**  
Georgetown University

**Secretary (2015-2017)**

**Michelle Polchow**  
George Mason University

**Treasurer (2014-2016)**

**Linda Wirth**

***Regional Representatives***

**Washington D.C.**

**Mimi Games (2014-2016)**  
American University  
Washington College of Law

**Virginia**

**Amy O'Connor (2015-2017)**  
University of Richmond

**Maryland**

**Lynda Aldana (2014-2016)**  
University of Maryland,  
Baltimore County

**Chris Zammarelli (2015-2017)**  
U.S. Department of State

**Jing Zhong (2014-2016)**  
George Washington University

**Margaret (Maggie) Dull**  
(2015-2017)  
University of Baltimore

## **Speaker Biographies**

### **Beacher Wiggins**

Beacher Wiggins has been the Director for Acquisitions & Bibliographic Access at the Library of Congress since June 2004 and manages a staff of approximately 400 with a budget of over \$90 million. He has worked his entire library career at Library of Congress, starting in 1972 as a cataloger. From 2002-2003, he was Acting Associate Librarian for Library Services. From 1986-1991, he served as Assistant to Henriette D. Avram, Associate Librarian for Library Services (developer of the MARC format). Beacher is active in the ALA (American Library Association) and IFLA (International Federation of Library Associations & Institutions). He received his undergraduate degree from Howard University in 1970, and his M.A. degree in library science from the University of Wisconsin - Madison School of Library & Information Studies in 1972. In 2013, he received the ALA's Melvil Dewey Medal for distinguished contributions to library technical services.

### **Xiaoli Li**

Xiaoli Li received her MLS from the Southern Connecticut State University. She worked at Yale University Library and University of Washington Libraries before moving to University of California Davis where she is Head of Content Support Services Department. Since May 2014, Xiaoli has been part of the BIBFLOW project team which consists of members from the UC Davis University Library and Zepheira. The project, funded by Institute of Museum and Library Sciences, investigates the future of academic library technical services operations, i.e., cataloging and related workflows, in light of new technologies, especially advances in the semantic web, and emerging data exchange models that are flexible and extensible, "machine" and human friendly, such as BIBFRAME.

### **Paul Frank**

Paul Frank is the acting coordinator of the Name Authority Cooperative Program (NACO) and the Subject Authority Cooperative Program (SACO). He is one of the lead developers of the Resource Description & Access (RDA) BIBFRAME profiles used in the Library of Congress (LC) BIBFRAME Pilot, and is a lead trainer in the pilot.

### **Kirk Hess**

Kirk Hess is a Digital Projects Coordinator in the Network Development and MARC Standards Office (NDMSO) at the Library of Congress (LC). He was the software developer for the BIBFRAME Editor and BIBFRAME Profile Editor which were used in LC BIBFRAME Pilot."

### **Tina Shrader**

Tina Shrader has been a cataloger since 1996, and a serials cataloger since 1999. She has held positions at Slippery Rock University, Arizona State University, Johns Hopkins University, and the National Agricultural Library. While at the National Agricultural Library, she served on the U.S. RDA Test Committee during the national testing and implementation planning for RDA. She is currently a Unit Head in the Cataloging and Metadata Management Section of the National Library of Medicine. She is NLM's representative to the CONSER (Cooperative Online Serials) program, and has been actively involved with NLM's BIBFRAME experimentation. She is a member of the CONSER BIBFRAME Task Group, and leads the subgroup tasked with mapping the CONSER Standard Record to BIBFRAME.

## Scholarship Recipients

### **Jessica Robertson**

I am currently a Cataloging Assistant at the Central Rappahannock Regional Library which serves the Fredericksburg area in Virginia. I have worked in this system for 14 years, starting out as a Computer Assistant in a very busy branch. I have been in Technical Services for 5 years, and catalog new fiction, non-fiction, and DVDs.

I received a Bachelor of Science in Library Services from the University of Maine at Augusta, and was also awarded the ALA Library Support Staff Certification. I am now attending Valdosta State University in Georgia for my MLIS, and plan to graduate next summer.

I feel that my studies have deepened my understanding of libraries, given me many opportunities to explore different departments, as well as made me very excited for all the possibilities facing libraries in the future. I am so appreciative of this scholarship from PTPL. It will make a big difference to me and my family.

### **Audrey Shenk**

Audrey Shenk is a part-time student in the School of Library and Information Science at the University of South Carolina and expects to graduate in May 2017. She received a B.A. in Mathematics from Eastern Mennonite University in Harrisonburg, VA. After graduation she worked as a cataloging and acquisitions assistant in the library at her alma mater. When the library automated in 1995, she transitioned from cataloging to systems administration. More than twenty years working with a library system has given her extensive experience in all areas of the library including acquisitions, cataloging, circulation, and serials processing. She has helped to implement many new technologies to update library services. The latest initiative is a digitization project in preparation for the centennial anniversary of the school. She led the efforts to select and install the hardware and software needed for the project and supervises the student workers who continue to scan the library's archival collections. She enjoys the challenge of implementing new systems and refining workflows to increase efficiency and improve services to patrons.

**Advisory Board Candidates**  
**Executive Committee**

***Vice Chair/Chair Elect***  
***Lynda Aldana***

Lynda Aldana is currently Associate Director, Technical Services & Library IT Services, Albin O. Kuhn Library & Gallery, University of Maryland, Baltimore County (UMBC). Prior to working in the Kuhn Library, she worked as the Coordinator for the Cataloging Department at the Milton S. Eisenhower Library at Johns Hopkins University and before as the Cataloging Librarian in the J. D. Williams Library at the University of Mississippi. She attended the University of North Texas for her master's in library science and has an undergraduate degree in bassoon performance from the University of Southern Mississippi. She has served on various Library, University (UMB), and USMAI (University System of Maryland and Affiliated Institutions) committees and working groups. She has been involved in various ALA Division committees and currently serves as Chair of LLAMA/SASS (2015-2016).

PTPL is a wonderful organization which always offers great programs on current topics as well as the chance to work with and meet colleagues in the area. I have enjoyed serving on the PTPL Board as the Maryland Representative and would love to continue my involvement with PTPL by serving as the next Vice-Chair/Chair-Elect.

**Advisory Board Candidates**  
**Regional Representatives**

**Maryland**

***Joyce Tenney***

Joyce Tenney is an Associate Director at the Albin O. Kuhn Library & Gallery, University of Maryland Baltimore County. She has served in varying capacities at UMBC since 1979. Her major responsibilities include serials management, electronic resource pricing and licensing negotiations, and other access services functions. Joyce is active in NASIG, as has been since its inception. She has served in many officer and committee chair positions in that group. Most recently, she completed a term as Vice President/President Elect, President and Past President. She is currently chairing NASIG's Strategic Planning Task Group. Joyce attended UMBC and received a B.A. in Ancient Studies, then attended University of Maryland, College Park for her Master's in Library Science. PTPL offers excellent programming and fills an important function for the professionals in the regional area. It would be exciting to participate in the planning and execution of sessions of this caliber.

**Virginia**

***Kimberly Edwards***

I am the Information Analyst for Technical Services at George Mason University in Fairfax, Virginia. Prior to this position I've worked in various technical services and cataloging roles in a mix of federal, state, and college libraries. I've always had a soft spot for PTPL – it was the first library association I joined when moving to the area in 2006 and the PTPL meeting that fall was the first chance I had to meet other technical services librarians in the region. I was so excited to see that there was an entire group that existed just to discuss the aspects of the profession that interested me the most! I would be honored to serve as Virginia's PTPL representative and to work to support our local libraries and the group as a whole.



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### Business Meeting Agenda

1. Opening of Meeting
  
2. Approval of 2015 Annual Meeting Minutes
  
3. Treasurer's Report
  
4. Conferring of Awards
  - a. Academic scholarships
  
  - b. Career Achievement Award
  
5. Call for Archival Material
  - a. Particularly 2003-Present
  
6. Election of New Advisory Council Officers
  
7. New Business
  - a. Change in PTPL name
  
8. Adjournment





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### Report of the Treasurer

October 2015 – October 2016

*Respectfully Submitted: Linda L. Wirth, PTPL Treasurer*

**Potomac Technical Processing Librarians**  
**91st Annual Meeting**  
**Library of Congress**  
**Washington, D.C.**  
**October 23, 2015**  
**Minutes**  
DRAFT

The 91st annual meeting of the Potomac Technical Processing Librarians (PTPL), “Exploring Linked Data” was held at the Library of Congress, Washington, D.C. Registration began at 9:00 a.m., accompanied by a continental breakfast. The program commenced at 9:55 a.m. with a welcome from PTPL Chair, Mark Winek. He introduced and thanked the PTPL Board and Bobby Reeves, PTPL’s webmaster. Mark then introduced the keynote speaker, Dorothea Salo, School of Library and Information Studies, University of Wisconsin, Madison.

Dorothea Salo’s presentation, “Quia Faciendum Est : Because It Must Be Done,” dealt with the necessity of moving away from MARC and XML standards. She considered the pragmatic question of *what* must be done to meet the challenges of metadata and migrating to linked data. She discussed the inability of computers to understand free text and what must be done to make the information searchable. Salvo stressed the importance of consistency in spelling, spacing, and dates in computer access to information. Rights statements are of primary importance because they inform digital collections users what they can legally do with data they find. The rights statements are now in free text, which the computer cannot interpret; the issue is being studied by Europeana and Digital Public Library of America. Salo illustrated her point about the nightmare of inconsistent language with examples from the MARC 020 field and stressed the need for controlled vocabulary and unambiguity. Networked computers need unique identifiers that do not change and are not language-dependent. URIs, like URLs, act as globally-unique identifiers.

Querying networked computers and matching up bits of data, such as ISBNs or authority strings, enable the gathering of enough small bits of data to compile search indexes, browsing tools, etc. Humans excel at resolving ambiguities, while computers demand granularity, consistency, precision, and clarity, which necessitate reliable, consistent use of delimiters. Hence, we must control free-text, be consistent in expressions of the same data, break down data so it is granular, repair multiple and inadequate delimiters, and use unambiguous and consistent identifiers. Because of the vast numbers of records, computer solutions are necessary, except in unusual instances where human interpretation is required. We need to cooperate to solve these problems but currently do not have all the necessary knowledge. Managers must allow staff time to learn. Salvo listed tools useful in editing multiple records: MarcEdit, OpenRefine, Regular Expressions, SQL, XSTL, and Catmandu/Fix. She believes a optimal learning is by just trying out new tools to fix important problems known exist and learning to resolve any issues that arise during the process. Salo’s presentation was followed by a brief Q&A session.

After a brief break, Nancy Fallgren, Metadata Librarian at National Library of Medicine, gave a presentation entitled *Prepare to be Linked*. First, Fallgren urged everyone to embrace change as part of the preparation for linked data usage. She defined Linked Data as a set of best practices for publishing and connecting structured data on the web. Linked Open Data is linked data that is freely available for reuse with no licenses or restrictions. Fallgren posits that libraries are unable to make progress because they are bogged down by process but that if they adopt an agile structure, linked data helps libraries to catch up and keep up. The semantic web is more granular and links bits of data (rather than documents) using RDF (Resource Description Framework) and IRIs (International Resource Identifiers). Each piece of data alone must be understandable without additional context.

Librarians must prepare for this change by learning through reading, linked data training, discussion, and experimentation and must adjust their focus to the data itself rather than records. We must have a clear

understanding what computers and human users actually need to know and be prepared to keep some data and lose others that can afford to be lost. We must assess requirements, develop and apply solutions, then reassess. Reiteration is a continuing process.

Preparing for linked data includes development of data models that enable the computer to put together information in a way that makes sense to a human. Internal decisions regarding use of RDF ontologies must be made by individuals and institutions as well as whose data to use. Shared authority files must be established. Best practices must be developed and shared. Linked data pilot projects and testing must be undertaken.

Other aids in information discovery are use of standard vocabularies in RDF, such as LCSH, MESH, and name authorities. To help manage information overload, institutions, including libraries and museums, should emphasize their special collections and unique materials and collaborate with search engine providers for manageable data. Fallgren concludes that the secret to linking data is using IRIs instead of strings.

Jackie Shieh, Resource Description Coordinator at George Washington University Libraries, presented "Deploying Identifier in a MARC Environment." Shieh believes the secret is that the identifier is unique, universal, and globally accessible with the IRI providing access through a variety of networks. Issues to be considered are which areas of BIBFRAME can be used in MARC, how best to use workflow educate and broaden staff understanding of linked data, and the ramifications of embedding an identifier in a MARC field or subfield. Other issues in employing an identifier in a RDF environment are data exposure, exchange, and linking. The identifier must be persistent, universal, and unambiguous to allow the computer to "understand" the information. The links themselves must be global, reliable, and resolvable.

In 2013 George Washington University Libraries began a project to apply BIBFRAME to over a million of its Voyager records and review the impact. The GW team worked with Terry Reese of MarcEdit. They found BIBFRAME fosters constant learning and experimenting. In their effort to integrate RDF linking concepts with legacy MARC data, the team discovered how best to facilitate data conversion and maximize data queries. They gained understanding of the contributions of metadata to the information sphere. Shieh reported that some positive effects of using IRIs were reduced maintenance, elimination of data ambiguity, and better user experience. The GW team now has nearly 4 million instances of using IRIs in the MARC XXO field. They can now focus on ontologies, vocabularies, and their users, metadata from outside library communities, and effective technology.

Shieh also reported that WRLC's 2015 initiatives include developing and implementing a plan to transition to a new library services platform using a single bibliographic record and enhanced authority control. Other ILS vendors are also beginning to provide for linked data.

Following a Q&A period, the meeting attendees enjoyed a buffet luncheon.

After lunch Mark Winek called the business meeting to order. The minutes of the 2014 annual meeting were approved as read. Linda Wirth presented the Treasurer's report. Current expenditures for the 2014/15 year included scholarships, the annual meeting, and PTPL's internet service provider. Current balance as of October 2015 is \$23,700.69, but not all conference expenses have been paid out yet. The Treasurer's report was approved.

Lisa Hilleary and Abbey Walker were introduced as winners of PTPL's 2015 scholarships. Each was presented with a check for \$1,000 to help defray graduate school expenses and also a year's PTPL membership. Mark introduced Janice Flug as the winner of PTPL's second annual Career Achievement award. Janice received a plaque and a donation in her name to a library scholarship fund of her choice. Janice spoke briefly on the importance of mentorship and encouraged PTPL members to mentor younger librarians.

A request was made of the members to contribute any PTPL documents in their possession to the PTPL archives.

Next came the election of new PTPL Advisory Council members. Regional representatives elected are Chris Zammarelli (DC), Maggie Dull (MD), and Amy O'Connor (VA). Michelle Polchow was elected Secretary and Karl Debus-Lopez, Vice Chair/Chair Elect. Their term of service is 2 years. Mark Winek automatically became Past Chair and Tiffany Wilson, Chair.

Two possibilities for a new, updated name for PTPL were introduced for a vote by the membership: Potomac Technical Services Librarians (PTSL) and Potomac Regional Technical Services Librarians (PRTSL), with results to be announced at the end of the meeting.

Mark closed the business meeting, and dessert was served.

Linda Wen, Head of Collections and Bibliographic Services, at American University's Washington College of Law, was the final speaker of the day. In her presentation entitled "Exploring Linked Data," she described linked data as a network of RDF vocabularies identified by a URI authorized vocabulary, including BIBFRAME. The vocabulary terms are interconnected with each other and the stream of data. Libraries identify entities with surrounding properties. This data on the web is machine processable, and the links are connected to authority records and can be queried. The linked data cloud is a hub of data, contributed by publishers and the library community as well as outside agencies, such as Google Knowledge Card, Wikipedia, and BBC semantic publishing. Benefits of this structure are easy and dynamic updates and lower application costs.

Legacy library data, such as authority files, structured names, and unstructured text, must be converted for use as linked data using various tools and standards. This work is being done by Library of Congress, OCLC Worldcat Works, Bibliotheque nationale de France, Oslo Public Library, etc. Wen provided examples of BIBFRAME applications to MARC records and presented a list of tools useful in this process. She cited XML and SPARQL as valuable tools. SPARQL is the query language of linked data and the semantic web that can query multiple databases with a single statement, make use of structured and semi-structured data, and transform RDA data from one vocabulary to another.

According to Wen, future descriptive practices will be very different from current practices and will involve expanded authority control, local authoritative hubs, use of URIs and reduced maintenance, more collaboration, crowdsourcing, and a good understanding of the library resource description landscape. A Q&A session followed her presentation.

Linda Geisler, current Past Chair, presented the traditional Historical Moment as her final duty. Linda noted that nine former PTPL chairs have come from the Library of Congress. PTPL's website lists Linda Geisler (2013), Vera Clyburn (2011) and Andrew Lisowski (1985 and 1986) as the most current chairpersons from LC. Linda noted that former Chair Charles Martel (1924) had developed a new classification system. Recurring themes of PTPL conferences over the years have been education and continuing education.

Mark Winek announced the results of the vote for a new name for PTPL. Since neither name received a 2/3 majority of votes, the association's name will remain Potomac Technical Processing Librarians. Mark then passed the gavel to the new chair, Tiffany Wilson, who thanked Mark, Linda Geisler, the current board, the new board, and all meeting attendees. A motion was made and seconded to adjourn the meeting. PTPL arranged for an optional tour of LC after the meeting.

Respectfully Submitted,  
Sue Neilson  
PTPL Secretary

## Name Change Announcement and Ballot

The Advisory Board of the Potomac Technical Processing Librarians (PTPL) hereby notifies the membership of a proposed change to the bylaws, to be decided upon by the membership at the 92nd Annual Meeting on October 21, 2016.

### Background

Colossal shifts in technical services over the past 30 years, especially with collections moving from print to electronic, have reduced the use of the term “processing” to describe functions or the librarians who perform those functions. As the organization seeks to remain relevant to all librarians who perform technical functions, the Advisory Board seeks the input of all current members. Members will be encouraged to vote for one of the two proposed names, to vote for their own write-in option, or to elect that the organization maintain its current name.

### Name

The name currently set in Article I of the bylaws is the “Potomac Technical Processing Librarians” (acronym: “PTPL”). The Advisory Board proposes two alternative names: “Potomac Regional Technical Services Librarians” (acronym: “PRTSL”) or “Potomac Technical Services Librarians” (acronym: “PTSL”).

### Authorization

Authorization for this proposed change to the bylaws is provided in Article XV of the Bylaws of the Potomac Technical Processing Librarians, adopted December 6, 1947, as amended:

“These bylaws may be amended or suspended by a vote of two-thirds of the members present at the annual meeting provided that notice of any proposed amendment was sent to each member, either by U.S. Postal service or email at least thirty days prior to the annual meeting. No proxy (absentee) ballots will be accepted.”

### Voting

The membership present at the 92nd Annual Meeting on October 21, 2016 will be asked the following question by secret paper ballot:

In the proposal to change the name of the organization currently known as the Potomac Technical Processing Librarians (PTPL), as established in Article I of the Bylaws, I select

[Enter **x** or **✓** in the appropriate box]

Potomac Regional Technical Services Librarians (PRTSL)

Potomac Technical Services Librarians (PTSL)

No Change

Write in: \_\_\_\_\_

### Results

Results of the ballot will be announced at the Annual Meeting and come into effect the same day.

### Questions

Questions about the proposed name change or about the ballot may be directed to Tiffany Wilson, Chair, at [twilson@umbc.edu](mailto:twilson@umbc.edu). Questions will also be fielded at the Annual Meeting prior to balloting.