POTOMAC TECHNICAL PROCESSING LIBRARIANS

A regional affiliate of ALCTS

ANNOUNCING

POTOMAC TECHNICAL PROCESSING LIBRARIANS
93rd ANNUAL MEETING

DISCOVERY & THE *NOW* GENERATION ILS: THE NEXT GENERATION IS HERE!
October 20, 2017
9:00 a.m. – 4:00 p.m.
Hilda and Michael Bogomolny Room
UB Student Center
University of Baltimore
1420 N. Charles St.
Baltimore, MD 21201

ub UNIVERSITY OF BALTIMORE

This year's annual meeting is generously sponsored, in part, by the University of Baltimore's Office of the Provost.

Speakers

Keynote: The (Actual) Next Generation of Library Management Systems
Peter McCracken, *Keynote Speaker*
Cornell University

What Should an ILS Do When Everything Continues to Change?
Penny Lochner
Muhlenberg College

Alma: a Different Type of ILS
Mike Rogers
University of Tennessee, Knoxville

SearchWorks, SHARE-VDE, Yewno: the Three Faces of Discovery
Philip Schreur
Stanford University

For registration and other conference information, visit the PTPL website:
https://www.potomactechlibrarians.org/event-2551219

PTPL 93rd Annual Meeting Schedule

09:00 – 09:55   Registration and Continental Breakfast
09:55 – 10:00   Welcome and Speaker Introduction – Karl Debus-López, PTPL Chair
10:00 – 11:00   Keynote Presentation – Peter McCracken
11:00 – 12:00   Penny Lochner (including 15 min. Q&A)
12:00 – 01:00   Lunch
01:00 – 02:00   Mike Rogers (including 15 min. Q&A)
02:00 – 03:00   Philip Schreur (including 15 min. Q&A)
03:00 – 03:15   Afternoon Break
03:15 – 04:00   Business Meeting and passing of the gavel

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

WiFi will be available.

Links for Directions, Transportation, and Local Information:

http://www.ubalt.edu/about-ub/directions/

The University of Baltimore is only a few blocks from Penn Station as well as accessible via the bus and light rail.

http://www.ubalt.edu/about-ub/directions/transportation/index.cfm

Visitor Parking Information:

http://www.ubalt.edu/about-ub/offices-and-services/auxiliary/parking-and-public-transportation/visitor-information.cfm

Hotel recommendations:
http://www.ubalt.edu/about-ub/directions/local-accommodations.cfm

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 2017/2019 Term

Executive Committee

<u>Chair Elect</u>
Vera Clyburn
Library of Congress

<u>Secretary</u>
Aimee Plaisance
University of Maryland, Baltimore County

Regional Representative

<u>Washington D.C.</u>

Christine K. Dulaney
American University Library

<u>Virginia</u>

Mei Kiu Lo
University of Richmond

Sophie Rondeau
Virginia Wesleyan

<u>Maryland</u>

TBD

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Current PTPL Advisory Board

Executive Committee

<u>Chair</u>
Karl Debus-López
Library of Congress

<u>Chair-Elect</u>
Lynda Aldana
University of Maryland,
Baltimore County

<u>Past-Chair</u>
Tiffany Wilson
University of Maryland,
Baltimore County

<u>Secretary (2015-2017)</u>
Michelle Polchow
George Mason University

<u>Treasurer (2014-2018)</u>
Linda Wirth

Regional Representatives

<u>Washington D.C.</u>

Mimi Games (2014-2018)
American University
Washington College of Law

Linda Wen (2016-2017)
American University
Washington College of Law

<u>Virginia</u>

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

Kimberly Edwards
(2016-2018)
George Mason University

<u>Maryland</u>

Maggie Dull
(2015-2017)
University of Baltimore

Joyce Tenney
(2016-2018)

Speaker Biographies and Presentation Information

Peter McCracken

The (Actual) Next Generation of Library Management Systems

Program Description:
The shift from card catalogs to online catalogs was, clearly, a revolutionary change in how we share access to library materials. We're currently experiencing another shift, to systems that finally put electronic resources on an even footing with print resources. Combine that with a truly open-source solution that dramatically reduces costs and that any library can use, and we have a chance for another revolutionary change.

A review of the current ILS landscape is in order: What ILSs are currently in use, and how well do they manage the universe of resources set in front of them? In most cases, librarians must still use different systems to manage print and electronic resources; this is obviously detrimental to our patrons and difficult for our library staff.

But FOLIO, a new open-source library management system being created by librarians, vendors, designers, and developers from around the world, combines an equal focus on print and electronic resources, with an open source implementation. It's being built to equally manage both print and electronic resources, and with a structure that should allow it to support whatever the future may hold.

In this talk, Peter McCracken, electronic resources librarian at Cornell University, will discuss the current state of the ILS landscape and resource management, then delve into the philosophy behind FOLIO, and how it differs – for better and for worse – from traditional library product development. He'll share the process and show examples of what FOLIO can do, or is being designed to do. FOLIO is a big, fascinating experiment in large-scale open-source library software development, and it is worth watching carefully, and even participating in, for those curious or interested.

Brief Bio
Peter McCracken is Electronic Resources Librarian at Cornell University, a position he has held since June, 2016. Peter worked as a Reference Librarian at East Carolina University and at the University of Washington, before starting Serials Solutions with his brothers and a friend, in 2000. In 2009, Peter started ShipIndex.org, a site that helps researchers, genealogists, and the curious, learn more about the vessels that interest them. At Cornell, he establishes and maintains access to electronic resources, and has been a member of the FOLIO Resource Management Special Interest Group for the past year. Peter holds a BA in English from Oberlin College, an MSLS from UNC-Chapel Hill, and an MA in Maritime History from East Carolina University.

Penny Lochner

What Should an ILS Do When Everything Continues to Change?

Program Description:
Connecting library users with resources remains a core role for librarians. The continuing expansion of electronic resources in library collections, increasing variety of acquisitions models, open access

resources, and interconnected services offers new challenges and opportunities for technical services staff. Trexler Library staff have been using OCLC WorldShare Management Services (WMS) and WMS Discovery since 2015. How has this impacted what we surface for our users and claim as part of our collections? Are we able to present all resources to our users and meet them where they are? Can we manage paid resources to maximize use of our budget and be mindful of the future? This presentation will review Trexler Library's approach to discovery, the changing role of the technical resources unit, and our experience using an ILS in a cooperative environment.

Brief Bio
Penny Lochner is Head of Collection Resources Management and the Serials & Electronic Resources Librarian at Muhlenberg College (Allentown, Pa.). Penny earned her M.L.S. from Rutgers University (1999-2000). Her perspective on information management, access, and use draws on experience as a legislative researcher and analyst in Washington, D.C., a catalog and web data manager for an STM publisher, a reference librarian, a publisher relations librarian at a subscription agency, and her current role in a liberal arts college library. Her research interests include the value of academic library collections and information discovery.

Mike Rogers

Alma: a Different Type of ILS

Program Description:
Academic libraries often keep an ILS system for six to eight years before it is time to purchase and implement a new one. The ongoing process of implementing a new system can work against the goals of Technical Services units struggling to stay caught up with ordering, loading records, receiving, performing database maintenance, authority control, and so forth. This is especially true as staffing levels continue to fall across all different types of libraries. It takes a lot of time to perform data cleanup in preparation of a system move, then more cleanup to fix all those "creative" workflows once you move to the new system and things suddenly don't work as smoothly as the salespeople convinced you they would. And then there is the learning curve and time commitment for training staff on the new system…

We implemented Alma at the University of Tennessee and went live in December, 2014. Even after two and a half years, Alma is proving to be vastly different from all our previous ILS systems. In this presentation I'll highlight these differences and explain what makes Alma such a unique system. I'll also discuss a number of advantages (and also some disadvantages) of moving to Alma. Finally, I'll share some thoughts on why I believe Alma can drastically break the "six-to-eight" year cycle of switching systems, and ultimately serve as a system for the long term.

Brief Bio
As an English major fresh out of college with no idea what to do with my life, I started working as copy cataloger at the UT Library in 1992. I did that for five years then worked in the Serials Department configuring algorithms for journal prediction patterns. This gradually evolved into a desktop support position followed by ILS administration. I've now worked at UT for 25 years and manage the Enterprise Systems Team. I'm married with two active boys (11 and 9) and love fly fishing, mapping caves, and exploring the wide open spaces out west.

Philip Schreur

SearchWorks, SHARE-VDE, Yewno: the Three Faces of Discovery

Program Description:
These three discovery interfaces are built on three contrasting technologies, come from three different traditions, generate three different sets of expectations. Are they simply three alternative facets on a similar pool of data or are they truly three distinct "personalities"? Using the Three Faces of Eve as a departure point, this presentation will explore the issues that make these powerful discovery tools unique.

Brief Bio
Philip E. Schreur is currently the Associate University Librarian for Technical and Access Services at Stanford University. He received his Ph.D. in medieval musicology from Stanford and an MLIS from the University of California Berkeley. His early focus was on cataloging and metadata development and, as chair of the Program for Cooperative Cataloging, was active in the implementation of RDA within the United States. With a mid-career shift to HighWire Press, he explored the automated sematic analysis of digital text and the assignment of controlled vocabulary terms at scale. He is currently the coordinator for linked data projects for the Stanford University Libraries and the PI for a Mellon-supported grant called Linked Data for Production, focusing on the transition of tradition Technical Services workflows to ones rooted in linked open data.

Scholarship Recipients

Lisa Hilleary

Lisa Hilleary is a technical services professional at Williamsburg Regional Library in Williamsburg, Virginia, and teaches history at Thomas Nelson Community College. She received a Master's degree in history from Old Dominion University in 2011, and will be graduating from the University of South Carolina with her MLIS degree in May 2018. She plans to continue her career in technical services, but is looking forward to new and exciting opportunities to expand into other departments or libraries in the future.

Leigh Ann Martin

Leigh Ann Martin is the Resource Description Associate for University of Richmond's Boatwright Memorial Library in Richmond, Virginia, where she manages the library's print workflow and supervises student assistant copy cataloging. She has worked in public, academic, and corporate libraries in a variety of roles, including circulation, audio learning, administration, and reference for a small business library collection.

She is currently enrolled in University of Wisconsin Milwaukee's Masters of Library and Information Science program, where she is pursuing a double concentration in information organization and information technology, expected to be completed in May 2018. She can be contacted at lbrosnih@richmond.edu.

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Business Meeting Agenda

1. Opening of Meeting

2. Approval of 2016 Annual Meeting Minutes

3. Treasurer's Report

4. Presentation of Academic Scholarships

5. Election of New Advisory Council Officers

6. Historical Moment

7. Call for Archival Material - Particularly 2003-Present

8. New Business

9. Adjournment

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PTPL 92nd ANNUAL MEETING
October 21, 2016
10:00 a.m. – 3:30 p.m.
University of Richmond, Virginia
Jepson Alumni Center
49 Crenshaw Way
Richmond, VA 23173

Minutes - Draft

The 92nd annual meeting of the Potomac Technical Processing Librarians (PTPL), "BIBFRAME" was held at the University of Richmond, Richmond, Virginia. 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, Tiffany Wilson. She introduced and thanked the PTPL Board and Bobby Reeves, PTPL's webmaster. Tiffany then introduced the keynote speaker, Beacher Wiggins, Director for Acquisitions & Bibliographic Access at the Library of Congress, Washington, D.C.

BIBFRAME: History, Overview, Progression
Speaker: Beacher Wiggins

Speaker bio:
Beacher Wiggins has been the Director for Acquisitions & Bibliographic Access at the Library of Congress (LoC) 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 LoC, 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.

Presentation:

In 2008 Wiggins suggested the discontinuation of traditional services and began a discussion on how to replace MARC. He reflected that it has taken six to eight years for a new framework to emerge, from theoretical model to pilot project, and now semantic web and linked data applications in the current 2.0 phase. Vocabulary has been established and experimental efforts by LoC catalogers have pioneered the way. Monthly collaboration has been established between LoC, Online Computer Library Center, Inc. (OCLC), Zepheira and National Library of Medicine (NLM). The focus has been on the holdings and profiling formats. LoC has successfully converted 13.5 million records, but fell short of their set goal to convert total of 18 million by October 2016.

2017 is the BIBFRAME 2.0 launch, rolling out the next phase of the pilot, with vision to create conversion programs and establish testing by the community. Linked Data for Production (LD4P) is supported through a $3 million Mellon grant and partners include Stanford, Cornell, Columbia, Harvard and Princeton. Although LoC's Linked Data Service will be available within the next 2 years, technology and community buy-in are targeted areas for development. Questions following the presentation regarded the patron experience, which Wiggins predicts will be another focus area of study.

BBFLOW: A Roadmap for BIBFRAME Implementation
Speaker: Xiaoli Li

Speaker bio:
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 (UC) 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.

Presentation:
Two years of grant work, have allowed an academic library to explore technical services workflows in an iterative migration to linked data without disrupting patron or business services. Li notes that 708 services interact with UC Davis Library System. Due to library's unique collection holdings on the topic of wine, the challenge explored interacting with unique authority sources. Another struggle Li mentioned was the institution of library has a huge legacy to carry forward, so this process is more than about migrating from MARC to BIBFRAME. Special collections pose unique challenges which 'just-in-time' cataloging may require greater enrichment. Another concern is that the ecosystem is cloud based, so if there is a system failure, there is no local system backup. Copy cataloging is a huge gain, but also found a need to identify what local data is required/desired for circulation, e-reserves, and interlibrary loan functions. For ongoing professional development, Li is following Kuali Community for Open Library Environment (OLE) and new listserv FOLIO, as well as linked data groups for Special Collections. Li also suggests the six Task Groups for Program for Cooperative Cataloging (PCC) at https://www.loc.gov/aba/pcc/taskgroup/task-groups.html ; Ex Libris' white paper on Linked Open Data; and book *From Record Management to Data Management: RDA and New Application Models BIBFRAME, RIMMF, and OliSuite/WeCa*t. Mauro Guerrini , Tiziana Possemato. 2016.

Li concludes that BIBFRAME will greatly impact technical services librarianship, opens opportunity for creativity, and help shape future with the linked data world. Positions will be more technologically oriented in a space where both machines and humans use linked data and hopeful future managers will be in demand and this higher paid skill set will be reflected in librarians' compensation.

12:00 – 01:00   Lunch

 01:00 – 02:00   BIBFRAME in Action: BIBFRAME Records, What They Are, How To Create Them, and More

Speakers: Paul Frank and Kirk Hess

Speaker bios:

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."

Presentation:
Paul reflected on the BIBFRAME pilot, noting a fundamental shift away from a "record" to a system of links, which has always been the traditional measure to justify catalogers' work. The beginning of the pilot focused on training in linked data and the Semantic Web, followed by studying profiles and then using the editor, used to create RDF graphs or 'records.' Although the emphasis was on the technical training, the overarching goal was to create linked data that could reveal result in a library 'hit' through Google searches, alongside those of Amazon and Barnes&Noble, exposing the libraries' holdings.

Kirk presented the technical services behind the pilot project, which tested 6 formats. Many authority lists, such as Library of Congress Names, LC Subject Headings, and Children's subject headings were loaded into profile editors.

As users practiced, they were encouraged to submit tickets to a troubleshooting system, suggesting adjustments. These suggestions created positive outcomes enhancing RDA for cataloging resources difficult to describe. Another attribute of the system was linking the RDA toolkit to view rules at point of use. So although standardization makes linking possible, through conversion, a lot of rich data in MARC records present the question of how BIBFRAME can retain this rich data legacy?

Future areas of work were identified as investigation into subjects, perhaps with technology creating recommendations for broader and narrower terms. Publication information is another area of transition. And departing from MARC as an international standard, it will now be up to local level of decision to

determine the depth of linking which will be displayed to users. Storage is also an issue regarding local versus web based URI data.

 02:00 – 03:00   BIBFRAME from a Cooperative Program Perspective

Speaker: Tina Shrader

Speaker bio:

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.

Presentation:

Schrader described her experience with BIBFRAME comparable to a maze, as linked data has so many paths open and there are not always clear choices. But one conclusion she can draw is that it has been much easier to navigate the maze by coming together as a profession, having libraries coordinate efforts, and collaborate. Program for Cooperative Cataloging (PCC), brought together BIBCO, CONSER, NACO, SACO, to devise a process that would make explicit the relationship of what the library holds with data that already exists out on the web.

NLM joined the subject >> predicate >> object as RDF triples to describe resources. But then expanded the work by linking authors additional works, clinical trial information to subject, drugs associated with subject, and created other useful relationships.

The collaborative effort placed an emphasis on access, focused on user needs and expanded RDA elements to BIBFRAME as a contribution to the community. Although the PCC BIBFRAME Task Force Group gathered June 2016, there is still much work to do on finalizing best practices for the serials community. Complications come from serials as an expression that changes over time through title changes, corporate bodies, and time itself is difficult to map, along with cataloger notes, end user notes, and the relationship among series. Solutions appear to lie in multiple ways to represent information and sharing best practice to create more robust outcomes. It appears that more input from lots of groups provides more ways to investigate these problems and challenges.

02:51 p.m. Business Meeting and passing of the gavel

Tiffany Wilson called the business meeting to order and asked for the membership to vote on the organization's name change. The name currently set in Article I of the bylaws is the "Potomac Technical Processing Librarians." The Advisory Board proposes "Potomac Regional Technical Services Librarians." The minutes of the 2015 annual meeting were approved as read. Linda Wirth presented the Treasurer's report. Current expenditures for the 2015/16 year included scholarships, the annual meeting, and PTPL's internet service provider. Current balance as of October 2016 is $30,809.79, but not all conference

expenses have been paid out yet. The Treasurer's report was approved.

Tom Ray was introduced and recognized for Career Achievement Award and then asked to present the scholarship recipients with their awards. Tom was recognized as initiating the PTPL scholarship program and 2016 marks his retirement from the profession. Jessica Robertson and Audrey Shenk were introduced and awarded PTPL's 2016 scholarships. Each was presented with a check for $1,000 to help defray graduate school expenses, as well as complimentary PTPL membership for one year.

Mark Winek, current Past Chair, presented the traditional Historical Moment as his final duty. He highlighted the places and tastes of the PTPL meetings over the past 92 years. Highlights included: 1923 meeting held at Grace Dodge Hotel with topic "Public Documents: their attendant problems." 1945 the meeting was held at the Richmond Hotel John Marshall and the topic was "Post-war cataloging at the Library of Congress." Winek noted a theme throughout that lobster was a repeated menu item in the organization's early days (stable at price of around $2.00 per person) as well as frequently selecting the site of Grace Dodge Hotel. There was evidence that this repeated venue was due to frugal cost concerns regarding the meeting site, based on advertisements found in the archives. The historic highlights were closed with a request made to the members asking for contributions of any PTPL documents in their possession which could be added to the PTPL archives.

Next, the elections of the new PTPL Advisory Council members were held. Lynda Aldana (MD) was elected to serve as Vice Chair/Chair Elect. Regional representatives elected are Joyce Tenney (MD) and Kimberly Edwards (VA). Their term of service is 2 years. Tiffany Wilson became Past Chair and Karl Debus-López, Chair.

Tiffany Wilson announced the results of the vote for a new name for PTPL. The association's name will remain Potomac Technical Processing Librarians with majority vote of 33, overriding 17 votes for Potomac Regional Technical Services Librarians (PRTSL), and 11 votes for Potomac Technical Services Librarians (PTSL). Tiffany Wilson then passed the gavel to the new chair, Karl Debus-López, who thanked the current board, the new board, and all meeting attendees. A motion was made and seconded to adjourn the meeting.

Respectfully Submitted,
Michelle Polchow
PTPL Secretary