

NLS Telephone Forum – 7-30-2014
(paraphrased)

Comment: (Richard Smith - NLS)

Greetings from the nation's capital! They tell me that (it's an) unusual, pleasant, cold day here on July 30. I'm Richard Smith, Chief of the Network Division and, welcome to the Telephone Forum for July 30, 2014. We're going to go around the table and introduce ourselves. To my right is...

Comment: (Library Staff - NLS)

Judy Dixon, Consumer Relations Officer; Tamara Rorie, Braille Specialist; Paula Bahmani, Education and Training Specialist; Pamela Davenport, Network Consultant; Margie Goergen-Rood, Assistant Head of Quality Assurance; Steve Prine, Assistant Chief of the Network Division; MaryBeth Wise, Network Consultant; John Brown; Neil Bernstein, R&D Officer; Jane Caulton, Publications and Media Section Head.

Comment: (Richard Smith - NLS)

Well, thank you all. We have 35 callers out in the field so I've got a nice crowd today. I'm going to start by mentioning a few things. Meredith Beckhardt – who is not here today but she has... I think you got an Operations Alert... she's really pumping out from the Reference Section, some of the Reference circulars, and she's got a new Assistive Technology information sheet that has information on screen readers and voice-recognition software and other assistive technology products – helped, I think, by Judy and Tamara – and that came out on an Operations Alert – and she also has Magazines Produced by NLS, and that's updated 2014. So the Reference staffs are cranking them out, and I mention that because I saw on LBPH – there were questions about local magazines, and I think she's working on that also. I expect that this fall if not late summer, so, that's one of the questions. (Also) Pam mentioned orientation. Pam...

Comment: (Pamela Davenport - NLS)

Hi everyone. The October orientation for 2014 is full. We have a lot of people and we're excited and waiting to see each and every person that has enrolled. The 2015 dates are: March 10-12 with a workshop on March 13; June 16-18 and a workshop is on the 19th; and in October – this is all 2015 – October 20-22 with a workshop being on the 23rd so, make sure if you want to send someone or you want to come, sign up for March, because you can't get in the October orientation and we're looking to see a lot more people come this way.

Comment: (Richard Smith - NLS)

And we'll send out an Operations Alert.

Comment: (Pamela Davenport - NLS)

We will send out an Operations Alert. So, if you didn't get those days, you'll get them in the Operations Alert. Or you can call your Network Consultant.

Comment: (Richard Smith - NLS)

And, Tamara...

Comment: (Tamara Rorie - NLS)

Yes. I am the Braille Specialist - for those of you I have not met – and I am currently working on a report called "The State of Braille at NLS." So that means I will be contacting all of you who have braille at your libraries to do an interview – and I'll be starting that next week. Feel free to email me at tror@loc.gov if you have a preference as to when you want me to give you a call. Otherwise, I'll just be calling and finding out who you want me to speak with. I'll need information such as...general information about your library first of all, information about how many consumers you serve. Information about how many libraries you provide books for (many of you provide books for multiple libraries). That kind of information. I'll also be asking you to identify a patron who you think might be willing to speak with me regarding the braille that they've received over the years. Those are the kinds of things I'll be asking you to provide for me. All of this will be in a final report which, I'm sure at some point, you'll have a copy of as well. If you have any questions about braille or the state of braille at NLS or any braille problems, feel free to give

me a call. Again we are working toward really pushing braille this year, so, one of my things is to speak with each of you about what your needs might be.

Comment: (Richard Smith - NLS)

Thanks, Tamara – and of course, Steve is here. He wants to say a few words...

Comment: (Steve Prine - NLS)

First, I'd like to talk about recall. About two-thirds of the books that were recalled for 2014 have been received at ForSight so, I would remind you (that) you have two months left. If you haven't gotten all your books in or, if you haven't started sending your books in, you've got two months to get them in. We're starting to monitor the list and, the consultants may be giving some of you a call just to follow up to see the status if we haven't seen anything from you. The contract for the disposal of RC books has not been assigned, although I understand that it is very close and they expect hopefully to have that contract awarded within the next week to ten days. The people that aren't a part of that contracting process don't have inside information but, ... we expect to have it awarded. The bad news is that it doesn't seem to be ForSight, so that means that we're going to have to print cards for libraries that have RC books waiting to be disposed of. As soon as the contract is awarded, we'll start that process – and then the cards will be shipped as soon as they're available – and we will notify the libraries when we start shipping the cards.

Currency Readers – at the two conferences held to date – the NFB conference and the ACB conference, approximately 1600 Currency Readers were provided to readers. We will have staff at the Blinded Veterans Association conference in August. (Readers) will be handed out there to eligible readers. Beyond that, we're still working to establish the distribution points for the readers. We sent out an Operations Alert last week... If a patron asks for a (reader) you can go (into Webnet) and check off to send this person a Currency Reader and, that will be used when the shipping actually starts. It still is not clear how soon that will happen. It will be by the end of the year, as far as we know at this point. Getting the names and getting the patron's requests in, allows us and allows the DEP to see the quantity of requests that are occurring so, that helps them in planning their production schedule for the Currency Readers. That's basically what I have at this point.

Comment: (Richard Smith - NLS)

Okay, I think we're ready for questions.

Question: (Lauren Abner - KY)

My question is about BARD which is unfortunate because there is something I want to look at first to ask my question. Oh well. I have a question about maybe getting some more categories for browsing on BARD. I've had a couple of complaints from parents or teachers who are trying to find something for a student or a child to read. Right now the categories for browsing are pretty limited – and especially the 'literature' categories. I think there's a book for very young, pre through K readers and there's a YA category but we're leaving out the middle grades, like 5 through 8 or 6 through 9, and some of the younger elementary levels, so I'm wondering if we can get some new categories and even on some of the nonfiction things, because it's random – like there is a 'juvenile geography' category and things like that. Is anybody working on that – or has anyone considered that before?

Comment: (Michael Martys - NLS)

The answer to your question has several parts. The first part is that even though BARD has a little search engine and such built in, the catalogue is still the primary search tool for various specific, targeted searches, because you can basically get any book that's in BARD via the catalogue. It'll have a link to it. So we would encourage you to make use of the catalogue and its more sophisticated search capabilities to maybe address some of your issue. The second part of the answer is that – long term – we're going to be replacing the search engine in BARD with something far more sophisticated, There is a contract currently out right now for someone to do this work and hopefully it will be awarded soon. But, basically what we're going to try to do is to give BARD a major search engine facelift using many of the modern search engine technologies that you're familiar with, such as faceting, sub-searches – meaning the ability to whittle your results down further and further, fuzzy searching things (where) you don't have to actually type in the exact spelling of something to find it. Things that you see on Google, Amazon... but that's our long-term fix, and for the short-term I would encourage you to use the catalogue. The third part of the answer is, if your question has to do with what's in the catalogue – the way books are presently categorized in terms

of grade levels or (things) of that sort, then that part of the answer goes back to Bob Axtell and in terms of how things are catalogued.

Comment: (Lauren Abner - KY)

Really, the issue is – especially with the schools I’m thinking about – if it’s not incredibly easy to find things, they’re just not going to do it. The only school accounts we have that are very active with downloading are ones where its either a school librarian who is in charge of it, and she already knows what she wants, and there’s one other school where someone happens to be book-savvy and knows what she wants and gets on and does it. But a lot of schools have been turned off and end up just relying on us sending books through the mail simply because a teacher is not going to take the time to go through the catalogue and try to search for, you know, grades 5-8 or whatever kind of target range they are, and if it’s not easy they’re not going to do it. We want to encourage the schools to download just to get it faster, and also to sort of get a handle on the overdues because we’re sending things that they may not like and they’re keeping them for way too long. If we could just make it easier for them to quickly find something that might be appropriate for the students. That might be better. It sounds like the long-term ‘facelift’ option is going to help out, but I guess in the short-term, I’ll probably be making a lot of recommendations and sending books by mail for those folks.

Comment: (Library Staff - NLS)

I just wanted to add one thing as an intermediate option. You can search on some of those phrases that appear in the annotations such as “grades 5-8” or “senior high” or “older readers.”

Comment: (Lauren Abner - KY)

I do try to encourage folks to do that sometimes but when (we say) “I know it’s not the best option but you can do this” there’s static on the other end of the line... Folks are saying “well, why can’t you just make more categories.” That’s the view from the patron side. If they’re having to take an extra step and trying to remember the appropriate grade level to choose from, they’re not super-impressed or happy with that option. But I have told people to do that.

Comment: (Richard Smith - NLS)

And remember, you can try some of the local bibliographies – that they have links to. That may help them.

Question: (John Mugford - NM)

A couple of questions here – one from our outreach person. Is there any news on updates from the Android app? She’s claiming that many people refer the Android devices because of lower cost. My other question, not related, but related to the RC contract disposal: Because of the delays is there going to be a change in the XESS scheduling?

Answer: (Steve Prine - NLS)

I don’t think there are. Once we catch up – once we get the cards, we’re going to provide these to the libraries that went through the XESS process but did not dispose of books in March, April, May, June and now July. From that point on we should be back on schedule.

Question: (John Mugford - NM)

OK and then regarding the Android app?

Comment: (John Brown - NLS)

We’re still working on that here in the building. We’ve made some progress on it. It’s actually a lot more responsive than it was previously. So our next task is to take a look at the user interface and it’s not ready for public consumption yet but things are looking good. We’ve got a target for the end of the year...

Question: (John Mugford - NM)

When you mentioned the end of the year, it reminded me of another question: My understanding is that the Currency Reader pilot program extends through the end of this year. What are the plans beyond that and what is likely to be the level of involvement on the part of the regionals?

Answer: (Steve Prine - NLS)

The BEP (Bureau of Engraving and Printing) project opens up to the public as a whole in January and BEP will be doing a lot of advertising and PR activities on the Currency Readers. The regional libraries involvement as it is now will be, if a patron calls and says I don't want to use the talking book service but I'd like a Currency Reader, would be going to Webnet and click that flag, indicating that person would like a Currency Reader and that will be the extent of your involvement. If the person comes to you and they're not a library user already there will be another process. We'll provide information on how they'll submit the application but it will also be your opportunity to talk to them about library service as an offer them library service. They are not required to take it but if they can use the Currency Reader they might be interested in library service.

Question: (John Mugford - NM)

So if we publicize the nationwide toll free number in respect to the currency reader and that person is calling from New Mexico, does that person then get referred back to us or does that stay with the NLS?

Answer: (Steve Prine - NLS)

That's a good question. In the September/ October TBT, we expect to actually provide information to NLS patrons about the currency reader and so that should generate some phone calls or some inquiries, but at this Point I wouldn't promote it because they still really are not available other than what we've given out at the conferences. We don't want to generate demand for something that still months away.

Comment: (Isabella Marqués de Castilla - NLS)

Hi, this is Isabella. About 2000 currency readers have been distributed at the two conferences. There have been some patrons calling the regional libraries. It seems that some of the currency readers they have received are defective. So if that happens just send us an e-mail. Send it to Steve. We are forwarding them to BEP. They are working with the patrons directly – troubleshooting the readers. Out of the five calls BEP has had, only one was defective. The patron will get instructions from BEP sending the defective readers directly to them and they will be sending a replacement. NLS is in the process of finalizing the implementation phase so we do not have a support system yet. We don't know how it's going to play out about where the readers are going to be sent, between September and January. Therefore in the meantime if you have any calls like that, just returned them to BEP. If you send us an e-mail that's what we're going to do. We are going to the worded to BEP and they are going to deal with it.

Question: (Abby Rimel - MO)

We were going to ask about the currency readers. We were wondering what the regional libraries involvement and responsibilities would be in regard to the distribution and also the return of the currency reader when there are technical difficulties.

Answer: (Steve Prine - NLS)

Well, Isabella really responded to where we are right now with it. We are trying to build into the process the infrastructure for handling these – a process by which once you are notified would... If a network library is notified that you have a defective reader, there will be a process by which they'll receive a replacement reader or would the ability to return that. It won't go back to the library it will go somewhere else. We've tried to design this process to keep library involvement to a minimum was because we know how busy the libraries are in providing (regular library services). We didn't want to bypass the libraries completely but at the same time we wanted a minimum involvement because we know how busy the libraries are already.

Comment: (Isabella Marqués de Castilla - NLS)

The libraries will be involved only if the libraries choose to be involved.

Comment: (Steve Prine - NLS)

Beyond just putting a patron request into Webnet – as we get further into the process there'll be other levels of participation that libraries can elect to participate in but there'll be no requirement to do that.

Comment: (Richard Smith - NLS)

You're not going to need to make space for thousands of readers if that's what you're asking. So there's no problem there but we will be working on procedures. The reader may be returned if the patron passes away then you'll have to send them back. Probably to BEP. But we're going to work all those procedures out.

Comment: (Abby Rimel - MO)

OK well that's good to hear. I guess the procedures are under development then.

Comment: (Richard Smith - NLS)

We wanted a test case with the American Council of the Blind and the National Federation of the Blind to see what the response was...and Blind Veterans will be in August.

Question: (Ruth Hemphill - TN)

Just to follow-up, Isabel said that if a patron reports a defective reader we should e-mail Steve and then someone said e-mail the Bureau of Engraving and Printing. So, does it matter?

Answer: (Isabella Marqués de Castilla - NLS)

This is how we've been handling it so far... So if a patron calls you saying they have a defective reader you can do one or the other. You can direct patrons to contact BEP or you can send us an e-mail, which we will forward to BEP. One way or another the institution will contact the patron, try to troubleshoot the currency reader, and if that doesn't work – if indeed the (reader) is defective, they will instruct the patron to send the (defective) reader directly to them as and they will be sending a replacement.

Question: (Ruth Hemphill - TN)

I think I remember at the conference someone said that we would have a demonstration reader at some point to show people, if they were interested. I don't know that we've had patrons that are interested but we've had other staff members that really want to see this thing. Do you think that will happen or not?

Answer: (Steve Prine - NLS)

It will. I just can't say exactly what the time frame will be. The first lot were produced to go to the conferences. So after the Blinded Veterans conference, we expect to have enough from that initial production to provide them to the Network libraries.

Comment: (Ruth Hemphill - TN)

We're getting ready to reprint our applications. And the last time we reprinted we took the wonderful one that NLS has on its website and put our address on it. If I remember correctly, you said that you were going to revise yours to include the currency reader. I was thinking that maybe I should hold off on reprinting until that happens, because I'm not sure where to put it on the application.

Comment: (Steve Prine - NLS)

Meredith isn't here this afternoon but that is something we're going to start looking at. We would expect to hopefully have them revised and available by the end of the year.

Question: (Ruth Hemphill - TN)

Can I leave the cassette players and RCs off of it when I reprint it?

Answer: (Steve Prine - NLS)

Yes.

Comment: (Isabella Marqués de Castilla - NLS)

This is for the applications. There will be two applications. In the NLS application we're going to add that box for people who want to become patrons of NLS and they also want the currency reader. If people approach you or us asking only for the currency reader, there will be a separate application.

Question: (Ann Piascik - RI)

I read for the first time in the News April-June 2014 issue that NLS is stopping publication of the Digital Talking Books Plus and my question is, until now I've been telling my patrons to discard the bimonthly issues for the

calendar year when the annual is published, so it's important for me to now make sure members are aware of this alleviation of the annual catalogue. Since this is an NLS publication, what has NLS done to let institutional and individual members or subscribers to this publication - the annual one – know when the last issue is going to be published? And I am assuming this was already done and this was a 2012, am I right?

Comment: (Jane Caulton - NLS)

We have announced that Digital Talking Books Plus will end in the January-February issue of Talking Book Topics. When we changed the categorization we announced then that we were ending it. We announced it in Digital Talking Books Plus, we announced it in News and we announced it at the conference and I think we announced it in the Operations Alert. So we pretty much covered all of those bases... This year, we will be putting out Digital Talking Books Plus for 2013 (as) the last catalogue. So going forward, people may want to keep the print edition of TBT and that's the best I can offer them at this time.

Comment: (Mary Jane Kayes – CA9)

Back to the currency reader, we're taking orders for patrons now. We're putting them in CMLS. I wanted to clarify, they're not going to get them before September 2 and now it sounds like they may get them even later than that.

Comment: (Steve Prine - NLS)

Yes. It may well be later than that.

Question: (Mary Jane Kayes – CA9)

You talk about years end. Do you mean fiscal year or calendar year?

Answer: (Steve Prine - NLS)

Calendar year I think, in this case. BEP controls the production and they have the final say on when we start releasing them, although we are putting the infrastructure in place to store them and to send them, they will make that decision. At the moment, it's the end of the year. Or if that changes we will certainly notify the Network. We don't even expect to see any until mid-October to early November (the readers actually being produced by the manufacturer). That's on their timeline so we don't know how solid that is.

Question: (Mary Jane Kayes – CA9)

But we can take orders now?

Answer: (Steve Prine - NLS)

Yes, please do. If a patron says they're interested go to Webnet and click that flag. Once we're ready to ship, we'll go into that database and pull information for every patron that requested a currency reader.

Question: (Mary Jane Kayes – CA9)

Is BEP keeping track of those of our patrons who have attended the meetings and already received their devices?

Answer: (Steve Prine - NLS)

We are going to have that information entered for those individuals.

Question: (Mary Jane Kayes – CA9)

So if we go in and tried to enter another, it won't let us?

Answer: (Steve Prine - NLS)

It will probably already be marked as "received." If you go in to request one for a reader and it says that they've already received one, then that means that they already got one at one of the consumer conferences.

Question: (Mary Jane Kayes – CA9)

Ok, and then CMLS is supposed to go away in October. Are we still going to be able to get into it to answer these requests?

Answer: (Steve Prine - NLS)

CMLS is going away. PIMMS is implemented in October but we have what we're calling the 'legacy' system because all libraries are not going to be able to roll over like, by October 1. It's going to take a while so we're still

going to maintain the legacy system based on that weekly transaction update for all libraries until they move over to PIMMS. Even with PIMMS there'll be that same functionality there. You'll still have access to do that.

Comment: (Library Staff - NLS)

If I could mention that when patrons come up to you and want to request a currency reader if you go into CMLS – if you could check their address and their last name. that would be wonderful. I was at the NFB convention and we were checking CMLS versus the individuals coming up for the currency reader. I would say that at least 25% of them had gotten married or they had moved and that wasn't in the system. So, if you wouldn't mind, while you have them on the phone, that would be a great time to check the address.

Comment: (Mary Jane Kayes – CA9)

And just one other mention here. It's really hard to tell people that "you have to wait for yours" when other people have them.

Comment: (Steve Prine - NLS)

I would only point out to you that this was not our choice. BEP chose to do this and if people are unhappy we're sorry.

Question: (Andrea Clarkson - OR)

Completely changing the topic, is Web XESS open this month?

Answer: (Steve Prine - NLS)

Yes.

Comment: (Andrea Clarkson - OR)

I've been getting an error message every time I've logged in and it's telling me to use Internet Explorer even if I'm in Internet Explorer.

Question: (Steve Prine - NLS)

What version are you on?

Question: (Andrea Clarkson - OR)

(Unsure).If it's an older version do I need to update?

Answer: (Steve Prine - NLS)

I think you probably do. That may be the problem.

Question: (Andrea Clarkson - OR)

My other question has to do with MOC. I was looking through my 'almost delinquent' patrons the other day and noticed that I had a high number, so I started scrolling through in checking them out and realized that I had marked a lot of these cartridges "lost." And yet they're still showing up as having cartridges attached to their account. Is that supposed to happen?

Answer: (Steve Prine - NLS)

Unfortunately, the person that can answer that question is in an interview.

Comment: (Richard Smith - NLS)

We'll get back with you because we don't have an answer.

Comment: (Michael Katzmann - NLS)

When you mark the cartridges as 'lost' and they are not counted toward the delinquency, they still are associated with the patron because they might come back at some stage. They may be lost at the post office. ...

Comment: (Steve Prine - NLS)

Why don't you do this? Send your network consultant the names of a couple of patrons that fall into that category and they'll work with Michael Martyrs to look at it.

Question: (Stacy Hathaway-Bell - TX)

I think my question has already been answered. It was about the currency readers.

Question: (John Mugford - NM)

I also have a MOC related question: Back in February there was mentioned in an Operations Alert that they were going to decrease the number of magazine subscribers. Has that trend continued or are things leveling off?

Answer: (Michael Katzmann - NLS)

As far as I know it hasn't gone down. Not significantly. I think it's a leveling off. I think what we saw was the basic clearing out of the list of patrons who had been receiving cassette magazines that really weren't interested in the program or weren't around... They've either become delinquent or withdrawn from the list...

Question: (John Mugford - NM)

Ok so there's not likely to be a similar action as was taken last February?

Answer: (Steve Prine - NLS)

I don't think so.

Comment: (Richard Smith - NLS)

We will double check, but the assumption is no.

Question: (Susan Hammer-Schneider - ND)

This is just a suggestion. We've gotten a number of calls on this. When our patrons are reading the talking book topics and they're going to call in an order, they call in the number but they give us six digits. What they're doing is they're reading the number after the book number which is the length of the book. So, if a book is DB 75165 then they would say 'one' after the five because it's 11 hours or, they'd say 11. My suggestion is to put the length of the book in another spot. Either at the end of the annotation or underneath the book number. We've had a lot of patrons that give us the length of the book. Has anybody else had that problem?

Answer: (Jane Caulton - NLS)

What we have found – I think the length is bolded. I think we resolved that in the July-August issue – because the length of time should not be bolded but the book number should. That format has always been that way and it was never a problem until we started bolding the length of time. But take the bold off the length of time and we think that will resolve the problem. Prior to that there was no problem.

Question: (Letitia Gittens - VI)

I'm asking about when we can start shipping books out again? XESS.

Answer: (Steve Prine - NLS)

We are very close to awarding the contract. I guess, in the next week or so but it doesn't look like it's going to be ForSight, so we're going to have to print new mailing cards. That's why we didn't send mailing card ahead.

Question: (Letitia Gittens - VI)

And one thing, are you going to reschedule us so that when we do start doing this, that everybody is not stacked up or how are you going to do this?

Answer: (Steve Prine - NLS)

Even though we stopped letting libraries ship to ForSight at the end of March, the libraries that offered books in March April May June and July we've got those numbers and we have the disposal lists so, we're going to mail libraries cards for everything offered during that period and then they can go ahead and start mailing the stuff. ... And I'd just like to remind you that there are two months left for recall of digital books.

Question: (Marilyn Stevenson - NH)

Hello, I have another question about the XESS RCs. We are still working through a list that we had submitted before March. We've put a hold on these and we're preparing them to be mailed but we haven't sent them to ForSight because I thought we weren't supposed to send anything even though our list is from before that.

Answer: (Steve Prine - NLS)

You are correct. Once the contract was ended, they couldn't accept anything more.

Question: (Marilyn Stevenson - NH)

OK so we should be able to ship to the new place even though we're working off an old list.

Question: (Steve Prine - NLS)

How old is the list?

Answer: (Marilyn Stevenson - NH)

I have no idea. I'll have to look.

Comment: (Steve Prine - NLS)

Why don't you look at your list and send me the number of books that you had on that list.

Comment: (Marilyn Stevenson - NH)

We've processed some. What I'll try to do is get you a more accurate number of how many we have left.

Comment: (Steve Prine - NLS)

Anything you have left, but also I need to know the ones you have processed. If you haven't shipped them off they can't go to ForSight now.

Question: (Serena McGuire - DC)

If we have the capacity to print, can we print our own cards for whoever the new contractor is?

Answer: (Steve Prine - NLS)

The short answer I guess, is no. Because we have to pay the contractors for the books they are receiving and one of the ways that we know how many they are supposed to get is by the number of cards we send to the libraries. Basically, giving you those cards is authorizing you to send the books. So, it has to be our cards.

Question: (Grace Groins - IN)

I have a question about out of warranty cartridges. I sent a stack of them in to Bob Norton and I haven't received any email or anything about what's going on with those books. Some of them say 'end of book.' Some of them say 'you are not authorized...' Some of them say 'cartridge error.' But I sent them in. He asked me to send them in. I haven't received any response. Can you give me any information on that?

Answer: (Steve Prine - NLS)

Quality Assurance will follow up on it. Unfortunately, Bob has not been well for the last few weeks, so... We'll look into it.

Comment: (Richard Smith - NLS)

Ok, well thanks for your participation – all 35 of you – and we'll talk to you next month. Thank you!

No more questions or comments.