NLS Telephone Forum – 07-25-2018
(paraphrased)

Comment: **(Richard Smith - NLS)**
Thank you, Jenny and welcome to the monthly phone forum. This is the first one since Nashville. I know a lot of you were there and we had an excellent time. We had a lot of communication and had some good comments from all of you (and) you got some information from the conference also. We have a full house here at NLS. We may have to have extra time just to introduce everyone. Around the table I think we have over 20 members. I'm Richard Smith. I'm Chief of the Network Division – and we have around the table…

Comment: **(Library Staff - NLS)**
Hien Nguyen, Bibliographic Control Section; Judy Dixon, Consumer Relations; Don Olson, Network Services; Meredith Beckhardt, Reference; Karen Keninger, Director; Juliette Appold, Music Section; Jason Yasner, Deputy Director; Steve Prine, Network Division; Michael Martys, Senior Advisor; Paula Bahmani, Education and Training Specialist; Kristen Fernekes, Publications and Media; Vickie Collins, Network Services; Andrew Skinner, Production Control; Shana Osborne, Equipment Control Officer; Meghan McArdle, Collection Development Section; David Perrotta, Network Program Specialist; Neil Bernstein, R&D…John Brown, Engineering;

Comment: **(Richard Smith - NLS)**
And we have Michael Katzman – a remote participant, online. Before we ask questions and open it up for everyone, I did want to ask – we do have a couple reports and one report would be Paula…

Comment: **(Paula Bahmani - NLS)**
Hi everyone…I'm pleased to announce that the updated Network Library Manual is available for your reference, on the Network Documents web page, under the heading "Manuals." The manual is available in a downloadable Microsoft Word version – which is searchable – and in HTML web pages by section. We will be sending out an Operations Alert announcing the availability of the manual, and the Operations Alert will also include the appropriate URL.

Comment: **(Kristen Fernekes - NLS)**
Hi everyone. As Richard just pointed out, this is our first meeting (since Nashville) and I wanted to take a quick moment…because we recently got a quarterly report on our advertising and I noticed that that was a big point of discussion when we were in Nashville - so I wanted to pass along a little bit of news. I won't go into too much detail, but I did want to share with you some good information we've gotten about the campaign and how it's performing. The best piece of information that we've gotten from our firm that we work with, is, since our radio and television ads were launched at the end of February, the number of visits…have gone up by nine percent and…people looking for information, that has gone up by twenty-two percent, which means that our television and radio (ads are) performing very well and…the people who were contacting you seemed a bit more motivated than from the earlier digital component of the advertising campaign… I also want to take a moment to just ask – you folks have shared some really good feedback with me over the period (that) this campaign has been running, and I wanted to continue to encourage that. I'd love to hear from you. If you're seeing anything specific at your library that you'd like to share – if you think that it's an indicator of any kind of trend…please by all means, email me. My email address is krfe@loc.gov. Also, I just wanted to share that we'd also talked about sending out a survey about TBT and TBT usage, and we will be getting that to you in the next couple weeks.

Comment: **(David Perrotta - NLS)**
Hello everyone. Those of you who were in Nashville heard a lot about our pilot project – to implement the NLS Gutenberg Duplication System at an initial group of six libraries using WebREADS. Those were Arkansas, Washington DC, North Dakota, Richmond VA, Fredericksburg VA and Kentucky. That pilot was so successful that all six of those libraries are continuing their use of Gutenberg. Two of them in fact – Kentucky and Richmond have already reduced their copy allotments to zero, and the rest of that group are already expanding their use of Dupe-on-Demand ongoing. So, now we're preparing for phase II which has us rolling the Gutenberg system out to six more WebREADS libraries. Those are Fresno County CA, Nebraska, New Hampshire, Arlington VA, Fairfax County VA and Roanoke VA. We have hardware and initial consumables shipping out shortly to that group. In addition to that, we're working with Texas and Pittsburgh – both of whom have now switched over to…a version of the WebREADS software that they've customized for their use.

Some of you have already heard, I think, that Michael Katzmann is working from home…he's recovering from some injuries and we're wishing him well and glad that he's with us remotely but not having him in the office has slowed things down slightly – but we're moving forward with this rollout to the second group and in fact, we have a conference call with that group of six libraries tomorrow afternoon. One last piece of news – some of you may have seen this already – Keystone Systems announced officially that they're going to support the Gutenberg duplication system for use with their KLAS software. Currently, their timeline calls for them to be ready with that by the December or January timeframe. So, we're in the very early planning stages for bringing Gutenberg to some initial group of interested KLAS libraries. More to come on that as (time goes) by.

Comment: (Don Olson - NLS)
Just a short reminder, first, we wanted to thank the libraries who have participated in the MOCA project. We've gathered a lot of very useful data from that project. Lastly, if you haven't yet, please speak with your patrons to make sure that they realize that the program has been extended through December. Thank you.

Comment: (Steve Prine - NLS)
One of the things that I think Kristen probably talked about at the National Conference is that we're working with a group to do another patron survey – but they were interested in what the Network has done, so if you've got a survey – or a Patron Satisfaction survey – in the last 12 to 18 months, if you could email your consultant the survey and the results, we would certainly appreciate it. We would also encourage you to – with new patrons and even older patrons – add their telephone number and email and/or email address to your circulation system – because that's now being tracked in PIMMS.

Comment: (Vickie Collins - NLS)
This is just a note for everyone that you should have received updated MOC delinquency reports – and these are more current, more accurate, so we hope that you will appreciate those, and NLS is planning to automatically mark as "LOST" items that are overdue by 18 months. NLS libraries will receive another summary email each day when the project is implemented.

Comment: (Richard Smith - NLS)
Jason Yasner is the Deputy Director, and he came up from the Library of Congress (downtown). He's been in service for (24) years.

Comment: (Jason Yasner - NLS)
Welcome everybody. I've been at the Library of Congress for 24 years. I've been in various management positions over the years – I.T. Services, and I was working on a special project called the "World Digital Library" which gave me the ability to travel all over the world and meet with national librarians, so I'm kind of familiar with a "network of libraries" at least for that… I'm very excited to be here. This is day three for me. There's a lot to learn. Everyone has been very warm in their welcome. I have a lot of papers to read and a lot of things to review. I'm very excited and eager to be here. I met with Richard this morning, as a matter of fact, to talk more about the Network Division. I look forward to meeting some of you as I go (out on) business. I'm going to start locally first…and eventually start getting out to the rest of the country. So, thank you for everything that you do and we'll be in touch.

Comment: (Richard Smith - NLS)
Again, because of Nashville, we really want to open it up for questions soon for things you may not have asked about in Nashville and, just imagine yourself back there and everyone was available to you and you just missed your time to do it – but you probably have some questions. I know I did a Project Management workshop and I gave you a tool on making charters and after the conference about 4 people asked me for templates. So I was about to send that so if you need a template, send me an email. If you're using some of the tools and it works for you…give us information on how the conference affected you going back to your library.

Comment: (John Brown - NLS)
So, we want to just let the libraries know that we're testing a new version of the DTBM software, which provides the functionality that we talked about at the conference, about moving from one book to another on a bookshelf for those using multiple books on a cartridge. We're kicking the tires on that internally and things look good so far. If we don't find any problems with that in the next couple of weeks, we'll have a release for you – of new software.

Question: (Ava Smith - TX)
We just had our 10th Hundred-degree day, so I know Arizona is probably laughing about that. Anyway, we had a question about batteries. Is there a shortage? What's going on with the batteries?

Answer: (John Brown - NLS)
I do not believe there is a shortage of batteries. We had a delivery two months ago – I think – to the Multi State Center East, so they should be filling orders (and we have another order due) mid to late September.

Comment: (Ava Smith - TX)
Okay. Well, we're running a little bit low. We got a partial shipment so we were just wondering when we could expect the rest of it.

Question: (Shana Osborne - NLS)
When was the last time you placed your order for batteries?

Answer: (Ava Smith - TX)
We've placed three battery orders in the last few months.

Answer: (John Brown - NLS)
You may have (ordered) right when we were still limiting…orders to 100 or 120 units. Through, like, April.

Comment: (Richard Smith - NLS)
Thanks… We'll look into it Ava.

Question: (Reed Strege – CA8)
Hello everyone. I have a question about new books that come to us – new digital talking book cartridges that come to us from the new book vendor. I've spoken to a couple of people about it at NLS, but I was wondering if, when the contract is renewed with them – I believe it's Potomac, and this might seem like a small detail but – the new books are not grouped together, so if we were to order 45 through copy allotment of a popular title, 45 of them sort of trickle in one by one rather than coming grouped together. My team told me that at some time in the past they used to come shrink-wrapped together – and again it might seem like a small detail but because we get quite a few new books every day, it actually ends up creating a lot of extra work on the receiving end, so, I don't know what the status of the contract that you have with that vendor is, but…

Answer: (Andrew Skinner - NLS)
I can check our contract stipulations with them and see if I can get that fixed up. I'll see what I can do.

Comment: (Michael Katzmann - NLS)
Make sure it's Potomac because…it's been a long-time vendor. They're not a new vendor. Sometimes the Post Office will break open (packages). It could be that. The newest vendor we have for producing the books would be Blackstone but that's still a couple years.

Comment: (Andrew Skinner - NLS)
If it is an issue with the Post Office, it's going to be a harder fix.

Question: (Maureen Dorosinski - FL)
I was wondering if we were going to get any more braille cases – item SH124?

Answer: (Andrew Skinner - NLS)
We're working on an acquisition of that now, but it's not going to be until fiscal year 2019…I can't get more orders but I do have them in our budget for FY19.

Comment: (Maureen Dorosinski - FL)
Okay. Well if any other library is listening and you have more braille cases, we here at FL1A would surely appreciate it – and we would find some way to thank you – send candy or something through the mail, because we are in need!

Question: (John Mugford - NM)
I think I understood earlier that there's a development in the works to have instances where there are multiple titles to a cartridge – announced automatically through the player. Is that correct?

Answer: (John Brown - NLS)
It's going to prompt the user – at the end of a book, it will tell you that you've reached the end of the book, and then there will be an announcement that says, "Press play/stop to start the next book."

Question: (John Mugford - NM)
Okay, so there won't be a "general listing" announcement available?

Answer: (John Brown - NLS)
You'll still have to go to the "Bookshelf" if you want to get all the books that are on the cartridge.

Question: (John Mugford - NM)
…So, the (improved) software…will be that, when one reaches the end of a book, the next book is automatically announced. Correct?

Answer: (John Brown - NLS)
Not automatically announced, but if you press the "Play/Stop" key, you will start reading the next book …user interaction is still required.

Question: (John Mugford - NM)
So how will the user know to do that?

Answer: (Michael Katzmann - NLS)
So, at the moment, you come to the end of a book and it says, "end of book." Then you press "Play/Stop" and it says, "end of book, press Play/Stop to go to beginning of book." If there are multiple books on the cartridge, it will say, "end of book, press Play/Stop to go to next book" and then you press the Play/Stop if you want to go to the next book, and it will move on. So, it's a way to navigate through multiple books without actually going to the Bookshelf. Obviously, it doesn't have as much functionality as the Bookshelf, but it is a way of doing that without going there. But it will tell you – when you get to the end of a book – how to get to the next book.

Comment: (John Mugford - NM)
Has this been perceived as a real need – something that people will benefit from?

Answer: (Karen Keninger - NLS)
John, I believe we have had multiple people request this.

Question: (John Mugford - NM)
Okay so in other words, they're getting multiple titles and they're getting stuck on the first book.

Answer: (Library Staff - NLS)
That's right John.

Question: (Kim Charlson - MA)
I am asking a question on behalf of James Gleason, who is on vacation today. He asked me to find out about the MOC "overdue/delinquent/lost" project that Vickie and Michael Martys mentioned. Are you checking against PIMMS as part of the process for running that report? Because he was dreading all the phone calls that we would get from families of people who were deceased, and all kinds of things, so he wanted to make sure that that was part of the weeding-out process.

Answer: (Michael Martys - NLS)
I think I know where he's going on this – is that when we automatically mark cartridges as "LOST" there's a potential that delivery would start back up again. Because all of a sudden, the system got the cartridges it was waiting for. So, one of the things that is going to happen as part of this process is that, if the system does move cartridges automatically to "LOST," it's going to put the person into temporary suspense – so that delivery will not be automatically restarted. And then, on the email message that you receive – alerting you to the fact that the system has modified…accounts – if you wish to, you could re-examine them and restart them. But the odds are, that if the system has been going in there and marking cartridges that have been delinquent for 18 months, the odds are that these people are not interested in restarting. What we're really trying to do is to remove the really old accounts from your delinquency report – so that they're not cluttering them up anymore. We basically mark the cartridges as lost, and basically suspend the account.

Question: (Kim Charlson - MA)
So we'll watch the reports that come in via email – especially in the next few days – because you might be doing the test, and we might see some of this going into effect.

Answer: **(Michael Martys - NLS)**

The scary thing is that when we run it for the first time, that first report is going to be a whopper. You'll clean up a lot of accounts at one time… I think the essence of his question – what he was worried about – is being addressed through the temporary suspense.

Question: **(Michael Katzmann - NLS)**

Can I just step in? If a patron is still receiving cartridges but they had one or two that got lost a long time ago, it will not suspend those patrons, will it?

Answer: **(Michael Martys - NLS)**

No, you're right. If they're already receiving materials, it will not suspend them. It's only going to suspend the people who are currently marked as "delinquent," meaning "not getting items." If they are currently getting items, it's going to let them continue to get items.

Question: **(Erica McCaleb - FL)**

I was actually following up on the question from the previous caller. So, the MOC cartridges – it's going to automatically mark anything over a certain amount as "LOST." Will that still hold true if they already have two lost cartridges? Will it mark more than two?

Answer: **(Michael Martys - NLS)**

No. It will just unconditionally mark anything above the threshold – which is currently set at 18 months – as lost. We're basically saying that for all practical purposes, that cartridge is not coming back.

Question: **(Andrea Clarkson - OR)**

Okay. My question – I actually have two. One goes back to the software upgrade. I'm going to assume that this is going to be included with the magazine cartridges also?

Answer: **(Michael Martys - NLS)**

Yes. When the software release has been finalized and ready to be distributed, the magazine cartridge system – which has the ability now, to distribute software updates – will be given the update and it will be automatically distributed on the next several months of cartridges that go out.

Question: **(Andrea Clarkson - OR)**

Okay great. That is wonderful. I hear that complaint all the time: "How do I access the bookshelf for my 10th magazine?" My second question has to do with recall. Has that been finished for 2018?

Answer: **(Steve Prine - NLS)**

Well, all the numbers have gone out. We're still in the process of having libraries send material back.

Question: **(Andrea Clarkson - OR)**

Is there going to be an opportunity for libraries that want to, to send additional? We're kind of drowning in withdrawn cartridges here.

Answer: **(Andrew Skinner - NLS)**

In the next couple of months there might be an opportunity – yes. We're trying to work a deal to do extra recall with UNICOR. That contract is in progress right now. We had a very good meeting with them this morning, so we might be able to do an extra 400,000 in the next year.

Comment: **(Andrea Clarkson - OR)**

Alright, well keep working at the top of your list. I have about 12,000 ready to go.

Comment: **(Andrew Skinner - NLS)**

I will add you to the top of the list to our pilot with UNICOR.

Question: **(John Mugford - NM)**

…A few months ago, I think there was an expectation (that) the recall numbers would be…higher in 2019 than 2018. I was wondering if the emphasis on Duplication-on-Demand is changing the…formula in any way?

Answer: (Andrew Skinner - NLS)
I don't think it would be. You still have cartridges onsite, so we're going to be asking for them to be sent in…we still will be duplicating product.

Question: (John Mugford - NM)
So, what do you anticipate the numbers to be for next year?

Answer: (Andrew Skinner - NLS)
FY19 I'm targeting 1.1 to 1.2 million cartridges and containers.

Question: (John Mugford - NM)
And what was the number this year?

Answer: (Andrew Skinner - NLS)
700,000.

Question: (John Mugford - NM)
Okay. We're hearing a number of libraries saying that they have a surplus, so are you planning to retain the same formula as this year? Or…

Answer: (Andrew Skinner - NLS)
I don't do the formulas. You'll have to talk to Steve on that. I do the aggregate numbers.

Answer: (Richard Smith - NLS)
We'll probably do the same thing, John. We'll just increase it by fifty percent. We also encourage all libraries to look at Copy Allotment. Make sure that as we're doing duplication of titles, that they may need to reduce the ones they're getting from us. That's the experience I had in the past. Make sure that you're not getting books that you don't need. And, finally I think that we are at the point where we'll be reusing the white cartridges down the road, to do Duplication-on-Demand, and reducing the need for recall. So, between all those we're hoping to catch up, because we have been behind for the last year and a half.

Question: (John Mugford - NM)
So the reuse of the white cartridges – is that anticipated to go into effect in 2019 in any way?

Answer: (Michael Martys - NLS)
I don't think we've decided on the timeframe.

Answer: (Andrew Skinner - NLS)
Yeah, I think we're looking at that timeframe. I would like to do it sooner than later. I know we have to do some different builds. John Brown and I were talking about it this morning – on how we can do that.

Question: (John Mugford - NM)
And just one final question: In the past, the recall amounts were more tailored to a prior Copy Allotment ordering. Now, it's more of a range – and I know from a little research on my part, it appears that proportionately, smaller libraries are being required to return a higher percentage of their collection than larger libraries. Has that issue been recognized? And is it being addressed in any way?

Question: (Richard Smith - NLS)
John, that's interesting. Tell me more about that.

Answer: (John Mugford - NM)
Well, a few months ago, a number of programs shared their numbers with me, and the conclusion was that larger programs were returning – I don't have the spreadsheet in front of me – 3.5 percent of their total reported collection, whereas some programs were returning 20 percent or more. So clearly there was (an imbalance) in terms of percentage share of returns – which seemed to me that it would be more equitable to have more balance. I think the overall average was around 7-8 percent – and that number will presumably go up because, the numbers are going up. So it would seem to me that it would make more sense in terms of workload and what-have-you to have a relatively equal share among the various programs.

Comment: (Richard Smith - NLS)

We do the best we can. In addition, John, every year since I've been here, there's always an emergency or an adjustment to those numbers. For example, Chicago closed and all of a sudden (there was a need) to withdraw their collection, and that changed the numbers. Every network has extenuating circumstances that changed the numbers, so if there's any problem, they can call (or email) me or Steve. In general, the new process seems to have a good acceptance by libraries. Thanks for the question and we'll keep in touch.

Question: (Ivan Johnson – CA8)

Hey, I'd like to thank you guys for getting that "advance to the next title" feature (done). That's going to be a real boon to our PCC program. I have one quick question: I used to go to the Network Library Manual online and generally, I'd be headed to the Contact List, but I've had a problem getting to that. Is there an updated version that someone can send me a link to?

Answer: (Paula Bahmani - NLS)

The Network Library Manual has been updated and we posted it in the Network Documents page. It just went live today, and we're going to be sending out an Operations Alert either today or tomorrow morning, that will have the appropriate URL.

Question: (Jane Glasby – CA9)

I'm so sorry to have missed what sounds like a really fabulous conference. I have two questions. One from Ricardo…who is our technician here. And I also had a question about the Ops Alert that said that we could sign people up directly for BARD – and I probably missed the explanation for this but, how does that work? Because normally if we sign somebody up, we might help them go through the process, put in their email and then we ok them and they get their password and then they change their password. We take them by the hand and take them through that process sometimes. So, what would be omitted this time?

Answer: (Michael Martys - NLS)

Well, our original policy was that we wanted the patron themselves to fill out the online application for BARD. Our motivation for doing that is that we knew that, to use BARD, there would have to be a minimal level of some technical skills – in order to use it successfully. We felt that if somebody could fill out the application, that would be a reasonable indicator that they had the skills to use BARD. As time has gone on and we've gotten into BARD Mobile, we realized that that policy wasn't as useful – and so we basically said that we no longer had that as a policy, and if the libraries themselves wanted to fill out the application, either on behalf of the patron or assisting the patron, that would be okay. So, in essence, you can just go to the application part on BARD and fill it out, and go to the BARD approval page and just approve it. So, that's kind of the change that was made. I hope that answers your question.

Comment: (Jane Glasby – CA9)

Oh, so basically what we've been doing all along is now legal (laughter). I'm going to hand it over to Ricardo. He has another question.

Question: (Ricardo – CA9)

Hi. I just wanted to find out the status of the labels for the Talking Book players – the chrome labels? We placed an order a couple of months ago. We're running really low and they just said that they were going to get the list of people requesting them and "we'll get back to you." Is there any update on that?

Answer: (Shana Osborne - NLS)

Chrome labels will be ordered…scheduled to be ordered for fiscal year 2019.

Question: (Jane Glasby – CA9)

Do you have any suggestions as to what we might do in the meantime?

Answer: (Shana Osborne - NLS)

If you want to order some on your own, you may be able to do that. Otherwise… I'll call you offline and maybe we can discuss an additional action.

Comment: (Michael Martys - NLS)

I'm going to make a follow-on comment…about the account creation in BARD (that) I just want you to be aware of: One of our projects for this upcoming year, is to basically change the whole application process in BARD. Now that all the circulation systems are interfacing with PIMMS, and basically informing PIMMS of what's going on with your

patrons in near-real-time, we're planning to remove the application from BARD, with the idea being that when you enter a person into your circ system and you give them the code, DDB9, PIMMS will be aware of that change within minutes – at least within an hour – PIMMS will get that information to BARD and BARD will just automatically create the account and email the patron. That whole process is just going to go away. Now, that does require however, that you'll have to some email address for the patron when you enter the information into the circ system. If that information is there, we can just automate that whole application process and eliminate that – and that's in our plans for the upcoming year, to make that change. Hopefully, that will reduce your labor and make things a little easier.

Comment: (Richard Smith - NLS)
That was a lot of questions and I hope we answered a lot of them back in Nashville. With that, we'll end the meeting and we'll talk to you next month.