NLS Telephone Forum – 10-31-2018
(paraphrased)

**Comment:      (Richard Smith - NLS)**

I'm Richard Smith, Chief of the Network Division. We have a nice crowd here in Washington. It's a beautiful day. It's going up to 70 degrees today and it's picture-perfect for all our visitors and tourists downtown. This morning they said (that) in the past fifteen years, five (of the days) hit 70 degrees, so one out of three isn't bad. I was surprised at that. With that, we'll be enjoying the holiday today. Everyone will be safe and dry, and we will have a holiday (Thanksgiving) next month and Christmas coming up and I'll just mention – we will combine the calls (for) November and December (on) one day and that will be December 5th. So just keep that on your calendar for the next Telephone Forum. We'll go around the table here. There are 35 participants out in the field. There are quite a number here. We'll go around and introduce ourselves. My name is Richard Smith. I'm Chief of the Network Division…

**Comment:      (Library Staff - NLS)**

Steve Prine, Network Division; Vickie Collins, Network Services; David Perrotta, Network Program Specialist; Meredith Beckhardt, Head of Reference; Juliette Appold, Music Section; Don Olson, Network Services; Margie Goergen-Rood, Quality Assurance;… Paula Bahmani, Education and Training; MaryBeth Wise, Network Services; Shana Osborne, Equipment Control Officer; Pamela Davenport, Network Services; Andrew Skinner, Production Control; Doug Ament, Office of the Chief Information Officer; Neil Bernstein, R&D; Michael Martys, NLS Senior Advisor; Mark Layman from the former Publications and Media section, now the Communications and Outreach section; Gabrielle Barnes, Communications and Outreach; Ericka Vaughns, Administrative Section.

**Comment:      (Richard Smith - NLS)**

That's it – and everyone sitting here is in costumes (laughter). With that, we'll go through some reports (that) staff would like to update you with on some of the things going on here in Washington and…we'll start with Andrew.

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

The recall program is still moving forward. The second recall contractors might be delayed due to the effect of Hurricane Michael. They are moving those operations from Florida to Fort Leavenworth, Kansas. New labels should be forthcoming to you for shipment to them – those that are approved – and we're pushing forward with that contract or, actually, interagency agreement if they are federal, so we're working on increasing that capacity.

**Comment:      (David Perrotta - NLS)**

I've got a quick update on our Duplication-on-Demand efforts. I think we've previously described this past summer that we've added six additional libraries to the six pilot libraries that started using the Gutenberg system last year. All of them are ramping up and in the process of converting increasing numbers of their patrons over to Duplication-on-Demand service, away from traditional service. Then, in addition to that group we've got two quite large libraries – Texas and Pittsburgh – who now have Gutenberg systems in place. Texas is still setting things up. Pittsburgh is pretty-well under way and in fact, we're going to be paying a visit to them next week and we're looking forward to that being in operation.

Out of that first batch of libraries that started last year, three of them – North Dakota, Kentucky and Richmond, Virginia – have already zeroed-out their copy allotment, and they joined – of course – Iowa, which was early to do that, using their own "super-dupe" system, which I have to admit, might be a slightly catchier name than "Gutenberg" but, they have their own system well under way, and so we now have four libraries that are at zero copy allotment, and a bunch of the participating libraries have already started reducing their current copy allotment and we think that several are getting really close to going to zero as well. Now that we're in the new fiscal year and we have our accounting codes and such, all squared away, we've been able to place orders for additional equipment to build additional systems, and we have built out a rollout schedule that calls for us to add two new libraries to the program each month through the coming year. So, we'll be making a lot of progress as the months go by.

**Comment:      (Gabrielle Barnes - NLS)**

We're just letting you know that we're finalizing exhibits for FY-19. We have about 28 national events that we'll be attending this year, and that's higher than we've done in the past, so we're really excited to be in your area. We will let each of the libraries know when an event is coming up (and) when we will be in your area and we would be happy for you guys to stop by any of our booths if you have any questions about how we're exhibiting. You can see

how we're doing our outreach that way. If you have a major event in your area, you can reach out to us and let us know if there are materials that you need – especially things like our photo murals or pop-up banners. You can borrow those from us as they're available.

**Comment:     (MaryBeth Wise - NLS)**

Hi. I'm representing the braille e-reader pilot communications team, and I was asked to give a brief update about the pilot project. Just to let you know, the official communications regarding the project, will be posted in an Operations Alert within the next couple of weeks. I can update you on a few key points at the moment. The plans for the e-reader pilot project are well underway. NLS has a team from Materials Development and the Network, working on the implementation plan for the development and testing of the e-reader through a pilot program. At this point in time, it looks like the pilot will begin in late calendar year 2019 or (in) 2020. We can say that the pilot testing will not begin before 2019. The contract for the development and design of the e-reader has been awarded. Again, an Operations Alert with status updates, will be posted within the next couple of weeks. The Network will continue to be updated on the project status – through Operations Alerts and other communications. We are always receptive to questions on the Open Forum call as well, and as specific details are finalized, the Network will be updated.

**Comment:     (Richard Smith - NLS)**

To give everyone a "heads-up," we are looking forward to getting a Network Communications survey out. In it, we just need your help to improve communications from NLS to the Network Libraries - both back and forth – for you to give us input on all the activities we're doing, and all the innovative things…we're planning to do over the next few years – during our second transition – from cassette to digital, and now from digital to wireless. So, we will be sending out a short survey, just asking you how you get information from us, and how to improve it. We'll be getting that out – I would say – within the next two weeks. With that, I'm looking around the table and seeing if there's any other announcements from this group. Vickie…

**Comment:     (Vickie Collins - NLS)**

I was just going to mention that we did send out an Operations Alert about the new Reader's Digest that will be available. The code is DIG-4 and that corrected code is on the Operations Alert. We hope that libraries will start checking with their patrons to see who would like to subscribe to Reader's Digest.

**Comment:     (Richard Smith - NLS)**

Thank you. With that, we'll open the call up to questions from the Network.

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

I may have a few questions, but I think I'll spread them out. I was looking at the "On the Move" publication that came out a few days ago and found the part about modified smartphone – next generation… I know that Michael Katzmann at the Nashville Conference, was fairly emphatic about concerns regarding battery life – long-term use of batteries – in respect to the smartphone versus a dedicated player such as the one currently in use, so I'm wondering if there has been any change - technologically or otherwise – that would open the door to smartphone consideration.

**Answer:     (Richard Smith - NLS)**

Michael's in London, but I've been attending a number of meetings and there's been no major change, John, from what his report is from Nashville. So, basically, not on that front, John. But we're keeping an eye open.

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

So, there's really no current explanation as to why smartphones are now being reintroduced – or introduced – as a possible alternative, correct?

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

I don't know if we would characterize it that way. They're not being reintroduced. NLS undertook a study…to examine what our options were for the future. In part of that study, there was a strong recommendation that we should look at – as one of our player vehicles – the use of lockdown smartphones or smartphone technology. It did not portray it as an absolute "done decision." It portrayed it as something we need to look at and investigate as a strong option. This year, we are basically doing that. We are undertaking a number of projects to explore those technical areas – and we call them "proof of concept" projects. We do have one of those projects that is examining the technology associated with a lockdown smartphone. I don't agree with you when you said we're reintroducing the concept.

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

I did say "reintroduce or introduce" so I was correcting myself in conversation – so I don't think we need to focus on that point, but the question – which seemed to be more related to Michael Katzmann's obvious contention during the National Conference - that smartphone battery life or smartphone existence itself has a limited shelf date. So, in respect to that question, have things changed?

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

No. I mean, that is one of the things that we're investigating, as to how long the devices and batteries would last. It is a conclusion, that we know (that) the use of those kind of devices – they would not have the same lifetime as our present player, which is almost a decade or more of life-expectancy. We know that, and that would be part of the calculation going forward.

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

And did (consultant) make that calculation in its recommendation?

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

They had some additional data as part of their research, but part of the work we're doing now, is taking those investigations further and getting more conclusive information. The (consultant) study I would characterize as a high-level study, with a very…high-level examination of some of these factors and, their recommendations were that these things need to be studied further, and that's what we're doing.

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

Okay, so partly, it's to respond to the (consultant) recommendations, irrespective of the merit – on some level – it's a back and forth discussion. Am I correct in that perception?

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

Basically, the recommendations were that a number of these concepts need to be investigated – and that is an appropriate thing to do.

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

So, one other point on the "On the Move" (publication) was the voice user-interface…let's see, I'm actually looking more at the "text-to-speech" on magazines. I'll use Gale InfoTrac as an example. It's been around for a decade or so. Out of curiosity, I took a look at a couple of magazines yesterday – one of which is distributed by NLS – The Economist. I'll have to admit, text-to-speech through InfoTrac is pretty good, and apparently it can be streamed or downloaded. In regard to this exploration, are existing services being looked at – that have already proven themselves in the field somewhat?... Would in some sense, interface with existing technology and services. So, InfoTrac – we'll call it a "digital periodical aggregator." There are others out there – I forgot their names right now, but I think InfoTrac has grabbed much of the field because of cost considerations, even though they did declare bankruptcy a couple of years ago, but I guess they're…reorganizing. My point basically is that this technology already exists freely. So, to some extent, if NLS is moving in this direction – which may be viable – wouldn't it make more sense to attach to existing services in some way or point to existing services?

**Answer:**        (Richard Smith - NLS)

I think we're going to explore that in our "Proof of Concept." …That's a good point. The answer is "yes."

**Question:**        (Erin Pawlus - AZ)

We're periodically receiving emails talking about a temporary suspension for an MOC patron. Can you remind me? At some point is it just lifted? I assume the patron has to call us and communicate it and then we lift it somehow – or how does that work?

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

So, what's going on is that we institute a policy – about a month ago? – where we began to automatically mark overdue MOC cartridges as being "Lost" if they've exceeded a certain amount of time. I think it's currently 18 months. So if a person has a MOC cartridge that has been overdue for 18 months, the system will just automatically mark it as lost. When that happens, there is a possibility that that patron will all-of-a-sudden go from "Delinquent" status to "Active" status. Now, if they've had a MOC cartridge that has been outstanding for 18 months, and they've been delinquent for 18 months, they're probably not paying attention to MOC anymore. And so, for us to mark that as lost and to have them become active, could be problematic. Delivery out of the clear blue would start happening again – and we thought that would be a problem. So what the system does, is that when it marks the cartridge as

being lost, and the person is possibly being able to go back into active status, MOC will automatically put them into "Suspend" mode, because it doesn't want cartridge delivery to just automatically restart. It notifies the library that it did that, and then the library has the option to remove the temporary suspension if they choose to do so. That decision should be made by the library. (They can) understand whether restarting delivery makes sense or not. That's the behavior of the system and why it does it – if it's trying to avoid a different problem.

**Question:      (Erin Pawlus - AZ)**
Okay so if we agree with you, there doesn't need to be any action taken, correct?

**Answer:       (Michael Martys - NLS)**
Right. It would be problematic if it just turned it back on.

**Question:      (Mary Jane Kayes – CA9)**
I'm calling because for a long time, we were ordering – every so often – the promotional posters that were from a photograph campaign and, we were able to personalize them with some of our information and make them unique to our library. By my account, there are still four of those photographs that have not been turned into posters, and we're still waiting to order them with our information put on them. So, I don't know where that process is and I'd like an update.

**Answer:       (Mark Layman - NLS)**
We have plans to issue the fourth poster before the end of the year. That's fallen behind for various reasons – but we are going to release the poster that shows Eddie Timanus – who was featured in the current issue of "News." …The man in a blue sweater, sitting on a park bench outside of his house – using a BARD Mobile app. So, we're going to release that, and you will have an opportunity to customize that, as you have the others.

**Question:      (Mary Jane Kayes – CA9)**
Okay. What about the woman in the boat and the women around the coffee table?

**Answer:       (Mark Layman - NLS)**
You know, some of those, we're rethinking. Three years ago, when we started these, we thought we would use those images, but now, we may have some better images. You're certainly free to access those images on your own.

**Comment:      (Mary Jane Kayes – CA9)**
I just can't customize them the way that you can – with the variable background. The "coffee table" one in particular, I was really looking forward to use at nursing homes and assisted-living facilities.

**Comment:      (Mark Layman - NLS)**
(If) any other groups on the call want to…share feedback on the other images that we haven't produced yet, that would be fine. (We were thinking) we might have some better images, but if you all like those that we originally posted, let us know and we'll certainly consider moving forward with those as well.

**Question:      (Jane Glasby – CA9)**
Good morning from here. Good afternoon to most of the country. We had a question about the firmware release. I presume that's going to be 2.1.15? On the website it's still (2.1.14). I was wondering when non-Gutenberg people were going to be able to get hold of that. The other question was about "download only" titles? So, if people are getting download-only titles, (the update is) not going to be pushed out on a cartridge? Are we going to have to make sure that they get a cartridge to update their machines? How do software updates happen in a download-only environment?

**Answer:       (Richard Smith - NLS)**
The firmware – we anticipate it coming out within a week. We were getting the documentation together. We're dotting the I's and crossing the T's. We hope within a week to get that out – and put it up on the website for you to use. Download-only – how a person gets that, I'm not quite sure. We'll look into it. Unless Michael has an idea. Mike?

**Question:**　　(Michael Martys - NLS)

So, the "download-only" people - I presume, Jane, that you're referring to them downloading from the BARD website?

**Answer:**　　(Jane Glasby – CA9)

Yes, or possibly if we download something for them and send it to them on one of our blank cartridges.

**Answer:**　　(Michael Martys - NLS)

On the first case, where they downloaded from the BARD website, there will be a link on the BARD website to the firmware update – and they would simply download it, put it on a cartridge, stick the cartridge in their player and it would update. It would also be similarly possible for you to stick it on any cartridge you make for somebody. The update can coexist with items on the cartridge. We might have to send you some instructions on how to do it but, basically, you can include it when you make cartridges that go out to people. Basically, that's how it works now on the other system. When MOC sends out cartridges to people, it includes the firmware update on the cartridges they receive. When they stick their cartridge in the player, it just updates the player.

**Question:**　　(Jane Glasby – CA9)

Right, and I'm presuming (that) that's what happens with people who are getting the latest cartridges sent to them that are produced by you.

**Answer:**　　(Michael Martys - NLS)

Right. I'm actually about to update MOC now, to start MOC sending out cartridges with the new firmware update. As Richard says, we're going to be doing that in the next couple of days. In terms of your latter question, I'm sure we can send out some instructions on what you would need to do for a "download-only" patron to include the update.

**Question:**　　(John Mugford - NM)

I came in about 5 minutes late in the meeting, but I think I picked up on David, presenting information about, uh, we'll call it Gutenberg here. I believe he said that the projection was up to two a month – up to 24 libraries during the federal fiscal year (unintelligible).

**Answer:**　　(Library Staff - NLS)

That would be the maximum number in 12 months. We're targeting two (per) month. We probably won't have two in the month of November. We might not have two in the month of December, but that's roughly the pace at which we're going, John.

**Question:**　　(John Mugford - NM)

I'm just trying to get a sense…basically…there are a variety of choices out here but for those libraries who may be anticipating the possibility of receiving some of this equipment. Is there already a schedule or a list developing? Are there already some libraries on this list? What may the schedule be looking like?

**Answer:**　　(Library Staff - NLS)

There is a roughed-out list that takes us roughly through July of next year. The priorities are based partly on interest from the libraries who have contacted us and partly on the urgency of their need. Some of them are in a situation where they're facing contraction of space and really need to move forward – and some have other concerns. Basically, we're accepting requests from people as they come in, and then trying to fit them into a schedule based on those priorities.

**Question:**　　(John Mugford - NM)

Okay, and will the schedule be public or private? And what is the best way to get on the list?

**Answer:**　　(Richard Smith - NLS)

It's in fluctuation – depending on the demand. When we know who's going on, we announce it.

**Question:**　　(John Mugford - NM)

So, that doesn't quite answer my question. It sounds like the list is essentially private, because of fluctuations in planning?

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

John, the list at this point is restricted to WebREADS libraries because they're the only libraries that can actually accept Gutenberg.

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

But that was going to be another part of my question. I don't think I'm being presumptuous here when I know that Tennessee is among the libraries with space considerations but is not a WebREADS library. So you're saying, essentially right now, WebREADS libraries are prioritized. The commitment is extended into July and, are there other WebREADS libraries that are likely to join the list of…so essentially encompassing all of this federal fiscal year?

**Answer:        (Library Staff - NLS)**

I think by the time we get to the second half of 2019, we'll have just about all the WebREADS libraries on board with Gutenberg.

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

Okay, so essentially KLAS libraries will not be in line to receive this type of equipment on loan through September of this year and perhaps slightly beyond. Correct?

**Answer:        (Library Staff - NLS)**

I wouldn't say September, but I would say it would be the second half of calendar 2019 before we would have the ability to start bringing on most of the interested Keystone libraries – KLAS libraries. Really the consideration is going to be the speed at which Keystone can integrate KLAS with Gutenberg. And so they're targeting the first quarter of 2019 and, we're doing everything we can to encourage them, and to assist them with that, but ultimately they're going to be in control of that schedule. What we're trying to do in the meantime – within our capacity to the best of our ability (is to) start rolling out to libraries that are ready now.

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

Correct…okay, and I know there's a second phase. I don't recall all the programs, but I'm thinking New Hampshire and Nebraska were among them – so are they already participants or has there been a little bit of a delay in the implementation of that second phase?

**Answer:        (Library Staff - NLS)**

Yeah, that second group already have their Gutenberg systems and they're in various stages of converting their patrons over to Dupe-on-Demand service.

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

So, approximately how many other WebREADS libraries will there be – going forward after this second-phase group?

**Answer:        (Richard Smith - NLS)**

We'll get back with you, John. In fact, we'll send you statistics if you want. I know you like statistics on some of the circulation of the current WebREADS libraries. The really nice ones are – Pittsburgh is very high in multiple (books on cartridge). I think North Dakota is second-highest and I think Kentucky is third-highest. They're our "stars" on Duplication-on-Demand.

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

So, in respect to those programs which are relatively large, you're talking about total numbers. Do you have the percentages for Pennsylvania…?

**Answer:        (Richard Smith - NLS)**

No…it doesn't go that deep. I could send you a little summary. You might be interested in that.

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

Okay, so just to summarize, it sounds like your understanding is slightly different from the ones some KLAS users are being told regarding the availability of a KLAS version of Gutenberg – we'll call it. You're hearing "up to the end of the first quarter" which will be March. I think we're being told something a little earlier than that. So, it's a moving target, let's say. So, in terms of availability of equipment through the NLS – the correlation of the two – we're

probably looking at September at the earliest? I'm not looking to pin down a number, I'm just trying to get a sense of planning so that when I share this information with others, I'm relatively – reasonably – accurate.

**Answer:** **(Library Staff - NLS)**
I think September is in the ballpark as an early date for when we'd be rolling out to interested Keystone libraries.

**Question:** **(John Mugford - NM)**
Okay, and are you taking those requests now, or is there going to be a formal process of getting in line?

**Answer:** **(Richard Smith - NLS)**
No, we're backlogged already because of demand for Duplication-on-Demand from WebREADS libraries. So, we're hoping that Keystone gets their group together and then we'll take that on when it comes.

**Answer:** **(Library Staff - NLS)**
Send us a note and we'll put you on the list.

**Question:** **(John Mugford - NM)**
Right. So before you accept any inquiries or Keystone libraries, you need to know that Keystone…

**Answer:** **(Richard Smith - NLS)**
I think a lot of Keystone libraries are on the phone, John, and I think they'll understand.

**Comment:** **(John Mugford - NM)**
I don't feel as though the questions are being answered clearly, but I understand that maybe they can't be at this point – but there could be greater clarity and I hope that we can achieve that. Thank you.

**Comment:** **(Susan Hammer-Schneider - ND)**
Hi everyone. I have just a little bit of an add. With us going on Duplication-on-Demand, we no longer have use for the boxes or containers – and we have 759 brand-new grey boxes for sale. We have to go through the State Surplus. We're going to be selling them for two for a dollar. Libraries, if you're interested, just email me. You can either pay by check to the North Dakota Surplus, or a credit card over the phone. I think it's about 759. I couldn't find my note that I had when I counted them up. If anybody is interested, I have brand-new grey boxes for sale. That's all I have. Bye.

**Comment:** **(Richard Smith - NLS)**
A Network Library garage sale! Thanks Sue. No one else? Okay, well, we'll see who remembers, there's going to be a combination November-December. December 5th will be the national call, and we'll look forward to getting you on board. We'll talk to you next month. Thank you!