

Comment: (Richard Smith - NLS)

Thank you, Ellen and, welcome everyone. This is NLS. We have a pretty nice day out here. It's freezing but it's sunny. We just pulled everyone out of the Christmas party to come up and join in the telephone call. We have 36 participants. I think that's pretty good for a nice December week. We'll go around the table and, represented here – my name is Richard Smith. I'm Chief of the Network Division here at NLS. To my right is...

Comment: (Library Staff - NLS)

David Perrotta, Network Program Specialist; Kristen Fernekes, Head of the Communications and Outreach section; Steve Prine, Network Division; Vickie Collins, Network Services; Juliette Appold, Music section; Neil Bernstein, R&D; Paula Bahmani, Education and Training; Judy Dixon, Consumer Relations; Don Olson, Network Services; Michael Martys, Advisor; Michael Katzmann, Chief of the Materials Development Division; Andrew Skinner, Production Control.

Comment: (Richard Smith - NLS)

That's everyone here from NLS. We had our karaoke downstairs for our Christmas party so, everyone has a sore throat – or I would have led them in a chorus of "Deck the Halls," but then again, we want you to stay on the line, so we'll open it up with Kristen – who is going to give us a short report.

Comment: (Kristen Fernekes - NLS)

Hi everyone. I wanted to take a few minutes today to give you just sort of a lead again on what we're going to be doing next calendar year – 2019. It's part of our collection of information to lead us into all the projects that we'll be doing in the coming year. We will be conducting a survey of both current patrons and potential patrons, which will take place in the spring of 2019. I wanted to let you guys know – I'll be sending some more information out about this, but I don't want to spring this on you when we get around to the time of the actual survey. The intent of this survey is to collect information about the sort of technical and equipment needs for both patrons and potential patrons. So, potential patrons will be a large group that will be sought out and asked questions – these will be individuals that are eligible for our services but aren't currently using (them). This is going to be for a different space than I know the excellent surveys that the libraries do of their individual patron groups. Several of you were kind enough to share some of those with me and we wanted to look at those to make sure that we weren't running over the same space. Again, this is very directed at the area of trying to determine...what kind of equipment folks need, connectivity, people's comfort with technology and that type of thing... More to come on that. I wanted to let everyone know that that's something that's around the corner.

Comment: (Richard Smith - NLS)

We have Karen Keninger join us with Jimmy. She came up from the Christmas party. Welcome Karen! Next on the agenda I think is David.

Comment: (David Perrotta - NLS)

Okay, just a quick update on our Duplication-on-Demand project. We continue to make progress on this. Arlington and Roanoke, Virginia are the latest two WebREADS libraries to zero out their copy allotment. So, we now have a total of nine Duplication-on-Demand libraries who have gone to zero copy allotment, and that's a really good sign. Pittsburgh continues to make progress with their ramp-up of Duplication-on-Demand as of early November when we were paying them a visit. At least 40% of their circulation was being handled through Duplication-on-Demand – and they continue to increase that, so they're probably the largest library so far to demonstrate the viability of this. Our next focus is going to be Maine. Their Gutenberg system was shipped to them last week, and I just got note that they received it and they're starting to set it up. They're ready to shift their operation from CUL to WebREADS – and then the plan is to move all of their patrons to Duplication-on-Demand in one fell swoop. So, that's going to be an important step when they take that. Lastly, last week we had – I think – a very productive phone call with Keystone Systems, who are the developers behind the KLAS circulation system. They have been at work at adapting KLAS to support Gutenberg. They're making progress on that and I hope at this point we can begin testing that in the month of January. So, progress on all fronts.

Comment: (Kristen Fernekes - NLS)

...dovetailing with what I was just talking about with our survey, I wanted to ask for input from individual libraries. We're really looking at what different libraries have found to be effective in educating and training patrons on BARD and BARD Mobile. This is just a...beginning of this process but I wanted to ask everyone – if you have a few minutes – to shoot me an email and let me know what you've found successful and what you've found to be barriers to this process. I wanted to give you my email address...it's krfe@loc.gov.

Comment: (Richard Smith - NLS)

The next thing on the agenda was a report from the Chair Conference and updates. I asked them at our Chairs call last week, if they could come on and give a plug for their regional conferences coming up in the spring. So, we're going to open it up for calls nationwide, Ellen – and the Chairs can get on and do that update. Other than that, it's open for everyone to call in with questions.

Question: (James Gleason - MA)

There was one other agenda item – that I wanted - to make sure we don't miss anything. It says "BARD usage in Network Libraries." Was there anything to report on that?

Answer: (Kristen Fernekes - NLS)

It was more of a question than an essay.

Comment: (Jill Rothstein – NY8)

Hey everyone. I am here to tell you about the Northern Midlands conference, which is going to be April 8-10 in New York City. We're going to be hosted at the New York Public Library's main flagship research building, and we have lots and lots of programming going on. We are going to be getting the official registration link out in probably early to mid-January. I put a little bit of...information on the Wiki. It's got a nice hotel for some people – and others can kind of do it themselves. We'll be talking more about trying to recruit some spark talks from you guys – and some panelists as well. We will be doing some tactile graphics workshops and audio-description workshops and, fun stuff. Shoot me an email or give me a call if you have any questions or need any advice on anything – hotels and stuff like that.

Question: (Sue Chinault - MI)

I have a question concerning the equipment, and how things are being allotted. I know we run up every now and then against PIMMS not matching what we have – and then being denied a shipment of machines, when we're actually in the position of bringing returned machines in the door, cleaning them, repairing them and putting them back out – sometimes the same day. So, we're really skinny on machines, and I understand that when there's a conflict between what PIMMS says and what our database and what we say, that is an issue that needs to be dealt with – but I guess I'm really wondering what is the inventory of remaining machines? How long before there are no new machines to issue?

Answer: (Richard Smith - NLS)

That's a good question, Sue. Basically, we're looking at it. What we need is correct numbers – and Shana, who is not here right now, (will) be sending out an Operations report on the beginning of cleaning up some of the inventory. Because our numbers are not matching up. We know that there are machines in libraries that are not in their inventory systems, so that they're not showing up with PIMMS. We also know that the transformation from CMLS to PIMMS – the migration – did not go exactly correctly either. So we have to clean that up – and Shana is going to send out an Operations Alert. So for the time being, she's been doing it one-on-one by library. She's worked with Florida. She's worked with New Jersey. She's worked with Pittsburgh to clean up some numbers. We're now in the process of sending out an Operations Alert to start everyone getting on the same page, because we need those numbers for our next generation of machines. But be assured right now – just the numbers in the Multi State – we have enough machines for the next 3 (to) 3-1/2 years. If we get the numbers in the field correctly, we'll be in better shape... So, we'll be asking all libraries to help us with that.

Question: (Jane Glasby – CA9)

I had three questions and they're quite different. The first question has just been asked by one of the librarians. He notes that Michelle Obama's book – which is number one – is "download-only." Is that correct?

Answer: (Michael Katzmann - NLS)

It will go up for copy allotment. At the moment, it's "download only."

Question: (Jane Glasby – CA9)

Okay, that's good to hear. Thank you. Another question about download-only books is that...we're noting that we've got big gaps in our shelving because of numbers that have been allotted to download-only books. We're wondering if there's any pattern, or rhyme or reason that we could use to plan about which ranges... Do you have ranges of numbers allotted to those download-only books?

Answer: (Michael Katzmann - NLS)

No. I believe they're just sequential as they come up. They're not segregated...

Question: (Jane Glasby – CA9)

What a pity. Anyway, we'll work that one out. And then my last question was completely different. I was wondering if you could all talk about what Marrakesh will mean for us in the future, in terms of circulating foreign-language books. Will we get the chance to do that sometime?

(Connection interrupted)

Answer: (Karen Keninger - NLS)

We expect to provide guidance to the Network with regard to materials that are NLS-specific – that are federal property – that we produce. Those materials will be handled differently - I believe - than anything that you might produce in your own libraries – and that you would have your own responsibility for. But the upshot is that we want to have good conversations with our lawyers and with others, with regard to the way the law will be interpreted, and we will share that guidance with you before Marrakesh goes live. Marrakesh will go live 90 days after the instruments are deposited with WIPO. They're not deposited yet. I'm not sure when that's going to happen, so we have about 3 months to have these conversations and work this out.

Question: (Jane Glasby – CA9)

So, that's about the United States lending to other countries. What happens (when) we want things from other countries?

Answer: (Karen Keninger - NLS)

As authorized entities under the law, which I'm sure all of you are, you would be in a position to acquire materials from other countries, independent of NLS. Whether we can all benefit from the work that is done, is something that we'd like to look at, but I believe that if you read the Marrakesh Treaty and the Marrakesh Implementation Act, you would see that you would qualify as authorized entities – and would have the privileges under that qualification.

Question: (Jane Glasby – CA9)

Thank you, Karen. That's helping to illuminate things a bit. Maybe we could have some kind of conference...online or something, where we could thrash this out a little bit?

Answer: (Karen Keninger - NLS)

Yes, I think that would be a good idea. We'll try to schedule something in January or February to maybe have a conference call specifically about that topic – for anyone who's interested.

Question: (Erin Pawlus - AZ)

The Reader Advisors had read in the Talking Book Topics about the updated software to make it easier to go from book to book on a cartridge. I guess that's included on all cartridges that contain multiple books or magazines. Is that correct?

Answer: (Michael Katzmann - NLS)

Our general collection does not contain multiple books so they are not containing the update but, all the magazines that are going out will have the update on them. Duplication-on-Demand libraries that are providing multiple books are also updating their software.

Question: (Erin Pawlus - AZ)

That's what I thought – based on the last call, and I don't have a Talking Book Topics in front of me. I think that it did make a mention of multiple books, so I thought I would ask about that but, as far as you know, none of the books from the collection will have it?

Answer: (Michael Katzmann - NLS)

That's right. Yes. Since the update is only relevant to patrons receiving multiple books, it's an inconvenience to regular patrons. It makes sense just to put it on those cartridges.

Question: (Erin Pawlus - AZ)

Okay. So, her question specifically was, "When did you start including (update) on the magazine cartridges? And have (patrons) been receiving them already?"

Answer: (Michael Martys - NLS)

Whenever the Ops Alert went out is when we did it.

Answer: (Michael Katzmann - NLS)

So it would have been at least several weeks ago.

Question: (Erin Pawlus - AZ)

Okay, thank you. So now my question, which is in regard to overseas braille. I know that sometimes the Multi State Centers don't have the shipping containers to send those overseas, so my hope is that we can use any size box, as long as the contents are under 15 pounds?

Answer: (Vickie Collins - NLS)

There is a recommended size – that is talked about in the Operations Alert, which we have. I don't know – I can check with our USPS liaison to see if that would be a problem.

Comment: (Erin Pawlus - AZ)

Okay. I'd appreciate it because we do have plenty of boxes we get for when you ship us braille – that we can use – but they are smaller in some cases.

Comment: (Vickie Collins - NLS)

Smaller is possibly not a problem but let me double-check with our liaison just to be sure.

Question: (Erin Pawlus - AZ)

Would that be an email to me? Or an Op Alert?

Answer: (Vickie Collins - NLS)

In fact, why don't you send an email to me about your question. That would be: vcoll@loc.gov.

Question: (Ivan Johnson – CA8)

Hello everyone. I have a comment and a question. I wanted to make the comment that with our Patron-Centric Cartridges that originate here in Southern California, we've been including the update for several weeks also. I have a question that's probably been answered a couple times but, when I go into BPHICS inquiry mode where I want to find out where a machine is listed as being located, that information is still accurate?

Answer: (Michael Martys - NLS)

We're not sure of your question. Normally, those questions would be answered by your own circulation system. Our systems are nothing but a shadow of the data that's in your circulation system.

Question: (Ivan Johnson – CA8)

Okay...I have a machine in hand and, it's not in my system, so the next thing I want to do is to go and find out where the machine is listed as being at – what state, or what library.

Question: (Michael Martys - NLS)

...and you want to know who is the proper owner of that machine? I don't believe there's a way for them to do that. They have to ask us that question, right?

Answer: (Steve Prine - NLS)

They need to ask Shana.

Answer: (Richard Smith - NLS)

We think you need to contact the Equipment Control Officer – Shana, and she'll check and tell you who the owner of that is.

Comment: (Ivan Johnson – CA8)

Okay – because in the past – and I've been into it probably in the last few weeks – there's been a utility, when you log into the BPHICS system – that tells us where the machine is supposed to be – and I just wondered if that was still accurate.

Answer: (Michael Martys - NLS)

No, that wouldn't be accurate. We're not using BPHICS anymore. If you're thinking that that's still the process, we probably need to send out a notice to everybody because there might be a mis-communication.

Comment: (Richard Smith - NLS)

Thanks for bringing that up. We'll hand it off to Shana this week.

Question: (Jill Rothstein – NY8)

Hey, this is actually totally different from the conference announcement. I had told you guys (that) I was going to check in on some of the Resolutions, specifically about MOC raising quotas, with this new thing that makes cartridges that are 18 months overdue, switch to "lost" – which totally does make sense, by the way. A lot of our patrons are suddenly getting their magazines stopped because their "lost" numbers are exceeding the quota – and (in) some of the Northern resolutions had been the suggestion that regional librarians be given permission to raise "lost" quotas for MOC patrons ourselves – just to be able to minimize the back-and-forth emails and be able to just help people quickly here. That was #7 if you need to know that. And then there was another one – the potential that you said you would be considering to kind of allow...the regional librarians to raise the quota for MOC.

Answer: (Michael Martys - NLS)

I don't have a direct answer for that, but I would want to give you one bit of information. When the system automatically marks cartridges as "lost," the temporary suspension is not because of a "lost" quota being exceeded. What the temporary suspension is doing, is that if the system thinks that the person is going to receive magazines suddenly, it suspends them to make sure that there's no abrupt resumption of service. It was not really meant to say that "if your 'lost' quota was exceeded..." It's not that way. What the system does is that it errs on the side of caution. When it marks a cartridge as being lost, it sometimes will suspend the account because it wants to make sure that the library double-checks the account and is happy with the service being continued. I believe that there is an email message that goes to the library and it says when an account is suspended, and when a cartridge is marked as lost so that it is brought to your attention. It's basically meant to be a cautionary thing, not a penalty thing. The libraries (are) totally in charge of temporary suspensions. You can undo them if you deem them no longer necessary. It shouldn't be taken as a draconian action because it's not meant to be that way.

Comment: (Jill Rothstein – NY8)

We do get emails. It's just too much for us to pay attention to individually – because we have so many postal problems here. Okay so that is clear. Thank you. In general through the idea of allowing regional librarians to raise lost and overdue quotas for their MOC patrons.

Comment: (Michael Martys - NLS)

That would be a policy decision for the policy people here at NLS to consider.

Comment: (Michael Katzmann - NLS)

I think also we want to make sure that we weren't sort of having "zombie" patrons who sort of come out from the dead and start receiving cartridges because time has passed, so I think that's one of the concerns also. While we have this pause, Andrew from PCS has informed me that the Michelle Obama book will go on Copy Allotment on the 15th, so that's next week.

Question: (Mike Marlin – CA9)

Good afternoon. I have a question and one of my staff has a question to follow. Mine is about MOCA – and just to try to get some clarification that MOCA is indeed ending this month, or for this year, and the pilot is coming to an end. We have a patron who was unable to successfully download from her device, and she hadn't heard anything from NLS or from us and so, (are) there any further instructions or clarification along those lines?

Answer: (Alice O'Reilly - NLS)

We are – you're correct – going to end the pilot on the 31st. That's when there'll be no more books. Even if you have a device, you won't be able to download because we're not going to have any more activity. We are actively finding solutions to the ways to get the machines back so what we're looking at right now is sending boxes to all the patrons who participated – a box in a box – and then having them return those devices to us, so I'm sorry that she was not able to successfully download ... Overall I think that pilot was pretty successful and we were able to find out lots of interesting things about the way that people could download directly into their home if they (had) not successfully done so before – including finding out that some people still weren't successful, which is useful information also. I think Paula is going to be sending out a communication about retrieving the devices. You should look for something from her and we'll be getting those mailings out.

Question: (Mike Marlin – CA9)

In the remaining two weeks, can we help this one patron out so that she can get a few more books?

Comment: (Library Staff - NLS)

If you would send me an email of who that person is, I will get in contact with that person.

Comment: (Mike Marlin – CA9)

I think I sent one to Paula, but I didn't realize I sent one to you, so I shall do so. Before I turn it over to Melissa, California also worked with Shana on machine reconciliation, so we wanted to give (credit to) her – and get some credit ourselves. And now, here's Melissa...

Question: (Melissa Ribeiro – CA9)

Hi. I had a question about the survey that was first mentioned. You said you'd be surveying current patrons and large groups of potential patrons. How are you finding those large groups? We're definitely interested in that.

Answer: (Kristen Fernekes - NLS)

Well, we're not actually doing that ourselves. We're working with Gallup, who I imagine you've probably heard of. They're sort of well-known for doing surveys. They have a variety of connections with different organizations and groups. If you have suggestions, by all means send them to me. What we're going to be doing, is (we're) going to be going through what's called an "impaneling" process, which means groups that have members that may be eligible for our services, will be contacted – and then those individuals will be asked potentially, "would you be willing to be part of this larger survey indices?" The size of that group will be much larger than the individuals that we'll actually survey. We're actually considering keeping that group impaneled for a longer period of time, in the event that we want to go back and ask them questions. I would love to tell you that I could give you a lot more information. That's a very simplified explanation but hopefully it's somewhat helpful. If you have suggestions of groups or organizations, by all means send them to me. The key to this impaneled group is going to make sure that we have individuals who are representative across a variety of demographics, including location. Obviously, it's going to be crucially important for us to understand individuals across the United States. Across disability. Across age. Across income and so on and so forth.

Comment: (Melissa Ribeiro – CA9)

So no, I don't have wonderful suggestions about it. I was hoping – if you guys are finding these large, wonderful groups of potential patrons – that it would be shared with us, then. We want your information.

Comment: (Kristen Fernekes - NLS)

Well, our first goal is to do a great survey. Subsequent to that, I think we might be able to consider that.

Comment: (Pat Herndon - GA)

I was asked to share information about the Southern/Western Conference of NLS libraries. We're going to be meeting in San Antonio, Texas from May 7th through 9th. Our theme is: "Fiesta: Celebrating the Future of Reading." We will be enjoying a stay at the Drury Plaza Hotel on the Riverwalk. We're still working on our agenda, but right now, we're pretty sure we're going to have a session on Marrakesh. Danielle has told us that she'll talk about her

trips to Egypt and China and her experience with libraries there. We hope to perhaps do a session on Reader Advisory. We're working up something on Information and Referral – if we can pull that one together. We've also got a commitment from a renowned cookbook author to be one of our guest speakers. We hope to open registration on January 15.

Georgia also has (a) “machines out of reconciliation with PIMMS” issue – and I would like to state “thank you Shana for going ahead and sending us machines when our inventory showed we had hundreds more machines than we actually had on hand” – because we were down to nothing. So, thank you very much and we're happy to get that reconciled.

Comment: (Richard Smith - NLS)

We appreciate your help. We need to get that corrected. Thank you!

Comment: (Joshua Berkov - NC)

Hi. This isn't so much a question as a comment about the Michelle Obama book. It was on the Copy Allotment list for November 15th. So, I'm not sure. It sounds like some people missed it. So I just wanted to mention that. And that's it, so thank you.

Question: (Amy Nickless - MO)

We had a question in regard to the inactivity period on BARD. We've had a lot of issues with patrons that (have) been suspended due to inactivity after 30 days because they tend to download a lot of things at once and then go several weeks without downloading. Is there any chance that we could get that inactivity period extended to 60 or even 90 days?

Answer: (Michael Martys - NLS)

BARD inactivity period has two levels. For people who have privileged accounts, which are usually library staff, it's 30 days. For patrons, it's one year.

Comment: (Amy Nickless - MO)

We're experiencing 30 days with patrons.

Comment: (Michael Martys - NLS)

There's one slight other thing that Neil mentioned, that we should cover so, when I'm talking about “inactivity,” the way BARD measures activity is whether you've logged in. For people using the web, it's pretty straightforward. You actually type in your account name and your password and you actually enter the web. For people who use BARD Mobile, whenever you fire up BARD Mobile and bring up the application, it is logging you in in the background. Now, there's a different limit in BARD called the A/O limit. If these people are using BARD Mobile, (it) has a limit as to how many books you can download in a 30-day period. If you exceed that limit, BARD Mobile will not let you play any books until 30 days go by. The reason for that is that it's like a failsafe. It's meant to catch people who are abusing the system. The A/O limit is very high. I think it's a hundred.

Comment: (Amy Nickless - MO)

That's not the problem we're experiencing though. It's actually that...maybe they downloaded 20 books at the beginning of November, and then go to use it today and its saying they're suspended. So, it's definitely doing 30 days for some people.

Comment: (Michael Martys - NLS)

The patrons are not suspended on 30 days – it's one year, so if you have some names for us to research, I'll look into that for you because that's not supposed to be happening. It's only the patrons who have privileged accounts that get suspended after 30 days. The other patrons are one year.

Comment: (Amy Nickless - MO)

Well we can definitely get a few names.

Comment: (Michael Martys - NLS)

And you can send it straight to me. My email is mmartys@loc.gov.

Question: (Beverley Shirley - TX)

Hi. My question is about the braille containers that are out of stock right now. We're hoping and praying that you all are planning on being able to have some to ship after the first of the year, and we're hoping for an update on that.

Answer: (Michael Katzmann - NLS)

I'll get some information from Andrew and I'll get back to you.

Comment: (Beverley Shirley - TX)

Okay, thank you. We have about 1500 braille that are waiting for containers.

Comment: (Erin Pawlus - AZ)

One thing – it's mostly a statement. We're kind of developing a backlog of our local books not being able to be put onto BARD. We do have the occasional librarian or patron who will see a book in Voyager that says that its available but it's not on BARD yet, so just wanted to let you know we're looking forward to being able to use that again.

Comment: (Michael Martys - NLS)

Acknowledged. We understand.

Comment: (Richard Smith - NLS)

Okay, everyone here is looking at me. It looks like they want to get back to the Christmas party. So, thank you for calling in and have a good holiday and we'll talk to you in January. So long!