

Preservation Stewards and FDLP eXchange - Transcript

Please stand by for realtime captions.

Joe Paskoski here again for GPO. We will be starting in about two minutes at 2:00.

Good afternoon everyone, welcome to the FDLP Academy. My name is Joe Paskoski. We have, as tech-support today, Ashley. I think we have an enjoyable webinar for you today. The presenters today are Abby McDermott, collection management librarian at GPO, and myself, Joe Paskoski, outreach librarian. Before we get started, I want to walk you through a view housekeeping reminders. If you have any questions you would like to ask Abby or me, or if you have any tech questions, please feel free to use the chat box. For people on desktop computers or laptops, it's located on the bottom right-hand corner of your screen. We will keep track of all of the conversations and questions that come in. We are also recording today's session and will email a link to the recording and slides to everyone who registered for this webinar. We will be sending you a certificate of participation using the email you used to register for today's webinar. If everyone needs additional certificates, please email us and include the title of today's webinar along with the names and email addresses of those needing certificates. Desktop computer or laptop users can zoom in on the slides being presented. To exit the full-screen mode, mouse over the blue bar at the top of your screen so that it expands. Then, click on the return button to get back into full view. At the end of the session, we will be sharing a webinar satisfaction survey with you. We will let you know when the survey is available and the URL will appear in the chat box. We very much appreciate your feedback. One last thing, I don't anticipate going to live website, but I have left open that possibility in case we need to. If we start doing that and screen sharing, once myself or Abby start talking, and start screen sharing, we won't be able to see the chat box. If you want to ask questions, go ahead and go up to that blue bargain. We will hand it over to Abby to begin the presentation.

Hello everyone, can you confirm that you can hear me? Great, thank you. Welcome, thank you all for attending. I am very happy to have this opportunity to talk about GPO's Preservation Stewards program and using FDLP eXchange for collection development. I use the FDLP eXchange system myself on a biweekly basis. My colleague, Megan is committed to claiming material from the eXchange system when we see offers that match with our current digitization needs. Ideally, we would like to see as much FDLP material as possible onto the shelves of the depository that is building their government documents collection. Many of you are likely already familiar with the program, I want to start by defining our Preservation Stewards partnerships. Preservation Stewards are any selective or regional Federal depository library that commits to retain and preserve tangible prints depository resources for the duration of their agreement with GPO. Please note that tangible in this case only refers to print, not electronic formats, as those are not considered preservation quality. Preservation stewards must submit an inventory of the print resources they intended to entertain and preserve. GPO reflects preservation stored item holdings in the catalog of U.S. government complications. The partnerships page on FDLP is your best source for information on all partnerships.

Do you plan to, or have you added new items to your collection? If you are collecting new titles for your collection, or filling gaps in the collection, please send an inventory of the new publications to GPO. Use the inventory template available on FDLP.gov. You can submit it annually or when you have a large number of new items in the collection. We use the inventory to keep track of which titles are being preserved, the number of presentations per title, and the number of geographically distributed Preservation Stewards. I will give a little more information on that program on the next slide. For all

those reasons, up to date preservation stored inventories are crucial to public information. Keep in mind, your updates are also added to the inventories made available to the community on FDLP.gov via the partnerships page. My colleague, Ashley, is pasting links into the chat including the link to the Preservation Stewards inventory. Which depositories are serving as Preservation Stewards? There are currently 44 Preservation Stewards. Here are two Federal depository libraries that have signed Preservation Stewards agreements with GPO. North Dakota State University, and Queensboro public library. You can view a fuel list by limiting the chart on our partnerships page to Preservation Stewards. You can also email Federal depository support services to request a spreadsheet listing all Preservation Stewards by Sue Doc. We welcome and encourage Preservation Stewards from any corner of the FDLP . Please follow the link to our interactive preservation stored map. However, the preservation stored program does serve as one of the key components of our regional discard program. It states, in summary, if a regional has retained materials for at least five years, and the materials are available on our federal agency partners and there are four tangible copies geographically distributed within the FDLP , see the color-coded regions in the map, then regional depositories will be able to discard those materials with the permission of the Superintendent of documents. The titles listed below, we currently only need preservation stewards in these geographic regions to ensure that distributed coverage. For the congressional record and predecessor publications, we need a preservation stored in the Northeast but for the U.S. code, we need a preservation stored in the Northeast on the south.

Why should your library consider becoming a preservation stored? The Preservation Stewards program can help your institution demonstrate his commitment to the program and provide guaranteed access to federal government information. Furthermore, preservation stored [Inaudible] to other institution stakeholders. You will also receive Preservation Steward promotional materials like bookmarks and posters that are exclusive to our Preservation Steward partners. I, personally, love the marble design in the logo that you can see on this slide. If you are -- If you already have a preservation commitment with another association, it is likely you can simply sign an agreement with GPO to become a preservation stored steward. To become a Preservation Steward, please start by reaching out by GPO to FDLP.gov.

Why should you consider adding to your Preservation Steward collection? Preservation Stewards are not obligated to add volumes to the titles or SuDoc ranges covered by their Preservation Steward agreement with GPO. It could be easier or less costly to replace fair or poor volumes with discards from another depository than to repair and conserve damaged volumes. GPO preservation provides a visual guide to assessing a publications condition to help you easily assess and items does condition. Alternatively, you could acquire a second copy of the volume for circulation. To encourage collection development by our preservation stewards, GPO will cover shipping costs. I will provide further details on that on the next slide. Finally, as other federal depository libraries discard some of their print collections, filling and collection development for your Preservation Steward collection is a valuable service to the national collection of U.S. public information.

As I mentioned a moment ago, GPO will cover shipping costs so you can acquire copies in better condition, or at a second copy to your FDLP collection. When you use FDLP eXchange for your development. We will send prepaid shipping labels to the discarding library that posted the offer in exchange but Joe will discuss how the system works to match offers and needs in a moment. To take advantage of this service, you can submit an ask GPO inquiry using the partnership category. Please include the following information in your inquiry. Point of contact, name of discarding library and point of contact, shipping address, titles and issue information of material being shipped. Condition of material. Number of boxes. Estimated weight of the boxes. If any special shipping is required due to the fragile nature of the publications, we will email the point of contact at the discarding library, the prepaid

shipping labels. Now, I would like to turn the microphone back over to Joe so that he can go through using the FDLP eXchange system as a collection development tool.

Thank you, Abbie. Welcome, everyone. You probably know me as someone who hosts many webinars but I am also the point of contact for the FDLP eXchange in our federal sub depository unit. I see some familiar places and phases. We should be able to have enough expertise to answer all of your questions. I am going to talk about the FDLP eXchange as it collects [Inaudible] this want to be an in depth training session. I would be happy to offer that to anyone who is interested at a later time either individually or as a group using another platform. I am going to be talking about the major features of the FDLP eXchange as it relates to use in collection development. Even if you are a library in your state and you are now using the FDLP eXchange as your primary tool.

Let me give you a little background about the exchange. We launched the eXchange in June of 2018. Before that, we contracted the eXchange -- We retired our national leads and offers list. It was a very simple list that I maintained for a while and others maintained it before me. Libraries would send their offers to me and I would post it in the website for a period of time. That was retired again, June 1st, 2017. Participation in the eXchange is voluntary, but the GPO would ideally like all regions of the FDLP to implement the eXchange as their primarily primary application. 24 of the 46 regional depository libraries use the eXchange for reviewing and approving discards. 10 of those libraries are Preservation Stewards. Every eXchange has an account. We set them up for all coordinators in 2018. Since then, they have changed and they have requested accounts and we have provided them. Every FDLP, no matter what they use for primary reading can post needs and offer materials nationally. I will get into that a little later. Currently, we have 1115 depositories.

Here are some numbers on the FDLP eXchange. This is pretty impressive. Fiscal year 2019 to 2021, remember, our fiscal years from October 1st to September 3rd. Fiscal year 2020, even though we are missing some January numbers, those are quite high. That included six months of the pandemic. That is pretty impressive. FY 2021 is tracking a little bit lower, but hopefully the vaccines continue to roll out. You can see the potential. There are potentially thousands of titles of for offers.

This is the key to the whole process. The review phases. We have three major review phases. The first two review phases are time periods set by the regional review. That is when an offer is selected and a regional in that state reviews it. They set a time period, let's say they say 45 days per they have 45 days to review it, they can review it immediately. If they pass on it, they can accept it, if they pass on it, before 45 days expires, it goes to selective review. That means all of the selective depositories within that state have the opportunity to claim that offer. If it passes through that stage, then often times, it will be allowed to discard. There is a third option, and this is national review. This is set by the library. The library has to offer this in advance. They set the review period. Review periods go for any length of time which benefits every depository in the country. It benefits GPO because we also look at those needs for our purposes. Those are the phases. A little background, this is March of last year. Because of the pandemic, when GPO changed the review periods, since then starting in September of last year, as more libraries reopen, we ask them to consider lowering that if they wish. A number of libraries are still using that 180 day, 90 day, phase one, phase two. To drill down a little deeper and show you how we can impact more, I looked at March 2021. We had 28,814 offers in the exchange. Of those, 18,979 were from libraries offering nationally. If you think about being able to search and select items in phase two in your state, that 18,000 represents 66% of all of the offers offered in March. In our search feature, the matching we do, you can acquire or match a need or offer. If you go by that percentage, about 66% from March. Potentially going through all of these three phases. That's 66 percent was a higher need than I

had anticipated. How do you post your needs for collection development? The theme of the eXchange is to make it simple for you. You can use a form that we have. I would recommend that if you have a small amount of weeks. We have all kinds of format you can filter by. You can clarify whether postage reimbursement is available. You can also define the condition. We offer definitions for those conditions. You can further refine your need by saying you are using it for digitization or perhaps you are using it for disaster recovery. There are all kinds of ways you can find your needs request. If you have a lot of needs, I would suggest uploading a spreadsheet. We provide templates for that. We also have examples of filled in spreadsheets you can use to get a clearer vision of what's coming. The beauty of posting a need is that there is no expiration date on it. As long as your need has not been filled by someone, it will stay there. A key point is that it must have the SuDoc number with the correct SuDoc punctuation. Spacing doesn't have to be exact. But, the SuDoc number must be proper. This is a very nice feature. The system Taylor's it to you, so it only prevents what is available to you. I was looking recently at some offers. Texas, for a period of time, had 10,000 offers. You can search within all of those. In case you thought well, maybe my SuDoc need won't match precisely for something, so I'm going to search and see what else is out there, you can do that I searching offers. If you see something, if the system is presenting it to you, it is eligible for you, you can claim it. Another nice feature, advanced search has many filters and components. You can filter and search all kinds of ways. The beauty of advanced search is you can save your searches. You can do one or multiple. Name them, save them, maybe if you have a student, you can say checked my saved searches. You can run those. The exchange doesn't really think of offers in terms of lists. The eXchange treats each and every publication that's entered as a discrete entity. If you need a list, we offer you lists. On any page that has a list of publications, search results, or listing of your needs and offers, you generally see a button like this that says export current view. If you click on that, you get a nice spreadsheet that you can download and use in any way you choose.

As I said earlier, if you see a need, if you see an offer that you want, the system is showing only what you are eligible to get. You can claim it. If you are searching, you can copy the item, turn it into an immediate need, and the system will match. Another way, if, for some reason, you happen to be searching all the needs and you see something and you say you know, I happen to have an extra copy of that, I can offer it to that library, copy that need, submit it as an offer in the system to match. Again, it's a very nice feature.

Matches and notifications. This is working towards simplicity. As I mentioned earlier, you have to have matching SuDoc numbers. The system can communicate to you by automatic notifications. You can set the notifications in your account. We have a notification system built into the FDLP eXchange. You can receive them that way. You can receive them by email, or you can receive them by both ways. If you think you are going to get a lot of notifications, you can get daily or weekly digest if you don't want to be overwhelmed by notifications. Once matching happens, or once you are claiming a need, claiming an offer, you can communicate with the other library via a messaging feature that is built into the eXchange. You can talk about shipment, postage issues, any issue at all. Of course, you can do that [Inaudible] but that messaging feature is built into the exchange. Who is using the eXchange and why do they like it? I have some testimonials from some libraries. Here is one from Alicia Kubas. This comes from a slide that she did last year. She likes the standard ides standardized process. One thing she mentioned in the presentation, multiple people can work in the eXchange of the same time. She likes the idea that she could have multiple staff members working on various aspects of the eXchange if she had a need to do that. Here's some of the things she was looking for. I thought this was very impressive. 137 matches she had on her needs. That's pretty good. She filled 137 needs. Also, as she mentioned, she encourages her depositories to offer nationally. A lot of regionals do that. A lot will recommend that they use them. We don't require libraries to offer nationally. We certainly encourage it. Alicia mentions

FDLP eXchange is where GPO and the FDLP overall is headed. [Inaudible] we received a testimonial from the University of Maine. This [Inaudible] they are also a Preservation Steward . They said we like the advantage of being able to offer nationally if we don't need the item for our regional collection. It also makes it easier for staff to review and select the items we need. We have also had good success offering some of our items nationally. The items we have offered to the exchange have been picked up by regionals throughout the country from East Coast to Hawaii. That's a very nice comment about the exchange. I think these are important comments. Also, speaking of for you, [Inaudible] her library is also a Preservation Steward from the United States reports. They made the comment, we don't require [Indiscernible - muffled] to include all pertinent information about each document. She says I truly wish that urban libraries would adopt the exchange. It's a huge timesaver over reviewing individual risk. It takes more no more time to post the exchange that does to create a list to send by email. That's a very important point. Last testimony from two Texas regionals. Angela just left. They go into some background about what they did prior to the exchange. They said this. Texas likes the FDLP eXchange for a number of reasons. It's nationwide, it has extensive training materials. GPO has provided online and in person trainings. Depositories can submit disposal lists. You have keyword searching and can contact other depositories via eXchange. I hope we live up to this one, GPO responds quickly to problems and answers questions as needed. Finally, they say FDLP eXchange simplifies the disposal list process and provides a streamlined approach with constant concern of every depository. You are liking the exchange, but you need some training, we offer plenty of that. First off, we have a training sandbox. You can go into the sandbox training site and do anything you wish to educate yourself, upload spreadsheets, search, set accounts, set all kinds of information in the sandbox. From the FDLP eXchange homepage, you can access tips, you can access videos. Those are from my brother sister predecessor, Alyssa. Each video is between one minute and 4 to 5 minutes. We also have webinars and other training materials. We offer templates for all kinds of things. If you want individual or route training, you can contact me, or you can request assistance. That includes concludes my part of the presentation. If you have future questions, go to askGPO. Or, you can submit an email to this email listed here. Do we have any questions for Abby or myself?

Joe, there was one question about adding multiple SuDoc items. Lisa addressed in the chat.

Thank you, Lisa. I'm glad we have one of our experts in the room today. Thank you. Any other questions? A nice feature I mentioned earlier, you can have multiple accounts. There's also the user accounts which is a little bit limited. You can have a lot of you stuff working on the same exchange at the same time. Any other questions?

Joe, do you mind if I address Kathy's question?

Yes please.

Hi, Kathy. Kathy and I have actually spoken about this, but yes, there is a new -- I can find the link when I'm done speaking. It is not really new anymore, but as of June 2020, there is a depository guidance document that states that when depositories leave, when they relinquish their FDLP status, we are now going to require a national offers over there tangible depository [Inaudible] and that in almost all cases, we would be doing that through FDLP eXchange. The purpose of that is, there's many purposes, but it's to strengthen the national collection so that we can do all we can to keep that material in the national collection, meaning that once a library leaves the program, they are no longer part of the FDLP. Their material can hopefully find a new home in a different depository that remains in the FDLP. We are still working on implementing that new depository guidance. I am working on that project with other

colleagues. We will be offering more information about it in the coming months. To the greatest extent possible, we would like to see exchange used for national offers of material. That is actually optional in the system. You have to enable the fact that your offers get posted nationally. For libraries that relinquish status and commit to leave the of DLP FDL, we are really going to take things in that direction to the greatest extent possible . Always considering and working with the fact that the designated regional for the library that's leaving the program gets first review of the material claims material first, and then the selective's in that same state or region of the exiting depository get the second opportunity to claim local material. This allows GPO to claim material to digitize and ingest. Thank you, Kathy, for your comment that you support that effort, that initiative.

Thank you. Lisa Russell made the good comment in shot that the training site is a good place. If you are considering the eXchange, you can try it before you buy it kind of thing. That's a very useful one. I am in there all the time. Any other questions for Abby or myself? My colleague, Ashley, just put in the satisfaction survey. Please fill that out. We also have information that Ashley is going to put in about our webinar tomorrow. You can view just about all of our webinars, we have a great archive that is easy to search. All of the current ones are listed there. The closed captioning transcript will be there with tomorrow's slides. Keep the questions coming, please. I'm going to go into a few wrap up comments. We have plenty of time for questions. I would like to thank Abby for her part of the presentation. I think she did a great job. I would also like to thank my colleague , Ashley, for keeping everything running smoothly. I hope you enjoyed the webinar. The next one is tomorrow, April 14th. Don't forget our spring 2021 depository from 1:00 p.m. until 5:15 p.m. You will receive notice of all of our upcoming webinars when they are announced. [Indiscernible - muffled] You can view it a calendar of upcoming webinars, access fast webinars, and [Indiscernible - muffled] there's lots of people in this audience who could do with another webinar. Are there any other questions for Abby or myself? Check out those short training videos, they are really terrific.

Joe, I believe we have one final question from Sarah.

When can we expect the next enhancements for the exchange? I believe that is in our update. We are waiting for an operating system that has to come first. At some point after that, we will get [Indiscernible - muffled] there is a link at the bottom the has a lot of the enhancements that should be coming. They are all listed there, or just about come of the things that you would want. That should coming out. I'm sorry I can't give you a timeline. Lisa Russell, she knows about it. We can't wait, also, [Indiscernible - muffled] any other questions for Abby or myself? Or are GPO people in the audience who know quite a bit about the exchange? Any last questions? We are way ahead of time. I don't want to close out early in case we miss anyone. Abby, Ashley, what do you think? Should we close it out?

I defer to you, Joe.

I think we are good.

Thank you, all.

Ashley says I think we are good. We are getting some nice shout outs. Thank you, thank you, thank you. Okay. I like to see the shout outs. See them from the other side, see them from this side. Ashley said she thinks we are good, so I think I will close things out. Thank you everyone for attending. I hope you learned something today. Thank you, Abby, great presentation. Thank you, Ashley. Please come back to

the FDLP Academy for more webinars. Again, tomorrow, we've got a great one, come back for our virtual conference later in the month. Have a great rest of your day.