FDLP eXchange
Multi-Regional States

Tom Rohrig. Texas, Region I. Texas Tech University
Angela Kent. Texas, Region II. Texas State Library & Archives Commission
Agenda

1. Introduction. Multi-regional states
2. Strategy. Pre-FDLP eXchange: TX disposal process
3. Communication. Transitioning all TX selectives to FDLP eXchange
4. Training. Preparing TX selectives for FDLP eXchange.
5. Technical challenges. 1.5 years using FDLP eXchange.
6. Tips and Q & A
Multi-Regional states

• Several states have more than one regional

• Sometimes official, sometimes by agreement

• Regionals determine how FDLP eXchange is used in the state

• No “best” way to incorporate eXchange into discard process
TX-FED: summary

• Traditional multi-regional
• [number of FDLP TX selectives]
• Disposal process pre-FDLP eXchange
  • https://wayback.archive-it.org/414/20180305070826/https://www.tsl.texas.gov/ref/fedinfo/stateplan.html#appd
Appendix D. Disposal Instructions

I. Documents Received through the Depository Distribution Program

1. Depository libraries wishing to dispose of any publications received as part of the depository program and retained for at least five years must ask permission from their Regional Depository Library by preparing a disposal list. The list will be reviewed and posted to the Texas State Library and Archives Commission Web site for review by Texas federal depository libraries. All publications that remain unclaimed after a specified date may be thrown away.
2. Your Regional Depository Library will notify you if certain publications should be retained for a longer period.
3. Depository documents in hard copy for which microfiche has been substituted must also be listed.
4. Microfiche discards
   1. Selective depositories may discard microfiche copies of depository documents after they have been retained for 5 years without offering them on a disposal list. This provision reflects the "Cornwell Method" as approved by GPO for the handling of microfiche discards.
   2. Libraries discarding large runs or sets of microfiche documents must receive permission from their Regional Depository Library before discarding. The Regional may reserve the right to require the selective to prepare a disposal lists for large runs or sets of microfiche.
5. Items to be discarded may not be sold unless the proceeds are forwarded to GPO.
6. See GPO Instructions for additional guidelines.
Formatting Disposal Lists

Text should be formatted for an 80 character line and must be saved in an ascii format.

Suggested column placement, arrangement and information for lists:

- Name of Institution
- List #
- Format of items listed
- Address
- Telephone Number
- Fax Number
- Contact person
- Email address for above
- Special notes; e.g., postage requested, mailing labels, etc.

<table>
<thead>
<tr>
<th>Class #</th>
<th>Title</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>(begin at 1)</td>
<td>(begin at 21)</td>
<td>(begin at 60)</td>
</tr>
</tbody>
</table>

How Disposal Dates Are Assigned

Disposal dates are assigned to lists as they are submitted to the Regional Depository. These tell selectives when the listed materials may be discarded from their collections. The date is officially conveyed to the libraries in a notification letter.

Since December 1, 1994, disposal dates have been assigned based on date of receipt. Lists received by the 15th of the month are assigned a disposal date of the last day of the following month; e.g., lists received by December 15 would have a disposal date of January 31. The disposal date is officially assigned in a letter of notification. Libraries who have not received confirmation of a disposal date within 10 days of submission should contact their Regional for further information.

Page last modified: May 15, 2015
TX-FED experience: planning

- Regionals already looking for other disposal options
- FDLP eXchange announced:
  - Meetings between Regionals
  - Meetings with FDLP eXchange
- Early commitment to FDLP eXchange by TX Regionals
- Regionals: prepared Needs Lists for posting on FDLP eXchange
- Began notifying selectives: via listserv and during site visits
TX-FED experience: communication

“FDLP eXchange is coming to Texas”

1. Initial email to selectives: as early as May 2017
   a) Framed as improved disposal procedures
   b) Next steps: what selectives needed to do

2. Updates to selectives: delays in launch, continue preparing

3. Troubleshooting with FDLP/GPO and selectives. Example: templates

4. Ongoing: new FDLP coordinators: “All disposal lists are managed through the FDLP eXchange tool. Details and instructions below.”
Exciting news! Texas will be adopting the GPO’s FDLP eXchange online tool, with an anticipated start date of **June 15, 2017**, pending any delays in release from GPO. After this date, Texas selectives will now be able to upload and keep track of their disposal lists on the new FDLP eXchange website. Continue reading for details (as we know them) and next steps for selectives.
FDLP eXchange and disposal lists:
- Disposal lists will be reviewed for one week for Texas regionals, then two weeks for Texas selectives, then an option to offer nationally. If you choose not to offer nationally, the disposal date for your materials would be three weeks regardless of when in the month the list was submitted. **This is a far shorter timeline than the disposal list process now and, for this reason, selectives may wish to plan on holding onto their disposal lists until they can post on FDLP eXchange.**

- Disposal lists can be batch uploaded in the following formats: Excel (.xlsx) spreadsheets, a comma separated values (.csv) file, or MARC xml. Templates will be made available by GPO (not yet available).

Questions/concerns? Please contact your regional. Both Texas regionals have completed the intent to adopt form and will be meeting with GPO in preparation of the rollout.
Region I. Tom Rohrig/TTU. tom.rohrig@ttu.edu. 806-834-2632.
Region II. Angela Kent/TSLAC. akent@tsl.texas.gov. 512-463-5426.
Also available:

- FDLP eXchange main project webpage: [www.fdlp.gov/project-list/fdlp-exchange](http://www.fdlp.gov/project-list/fdlp-exchange)
- FDLP eXchange FAQs: [www.fdlp.gov/project-list/fdlp-exchange-faq](http://www.fdlp.gov/project-list/fdlp-exchange-faq)
Updates as we find out about them, will be posted to the TX-FED discussion list. Make sure you and your colleagues are subscribed to the TX-FED Discussion List for federal depository librarians in Texas. Email: TX-FED@unt.edu

Tom and Angela
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Next Steps for Selectives:

· (required) Log into your FDLP profile to confirm all information is up to date: 
catalog.gpo.gov/fdlnpdir/login.jsp

· **Share this good news with your administrators.** FDLP eXchange benefits: www.fdlp.gov/file-repository/about-the-fdlp/gpo-projects/2849-how-will-the-fdlp-exchange-benefit-my-library

· Register for training designed for selectives, available starting June 1st: www.fdlp.gov/project-list/fdlp-exchange#selectives

· Review the virtual meeting, “FDLP eXchange: Managing Discard Processes,” which provides an overview 
http://login.icohere.com/connect/d_connect_itemframer.cfm?vsDTitle=FDLP%20eXchange%3A%20Managing%20Discard%20Processes&dseq=18332&dtseq=105819&emdisc=2&mkey=public1172&viNA=0&vsDTA=&PAN=2&bDTC=0&topic=standard%20default%20linear&vsSH=A
GPO THANKS FDLP EXCHANGE EARLY ADOPTERS

GPO would like to thank the early adopters of FDLP eXchange. Libraries using the system have provided valuable feedback that will lead to additional enhancements for the next round of development.

We would like to acknowledge the following libraries for their early use of the system:

- The first offer was posted by the Louisville Free Public Library in Louisville, Kentucky.
- The first need was posted by the Utah State Law Library in Salt Lake City, Utah.
- The Dallas Public Library System, J. Erik Jonsson Central Library in Dallas, Texas posted the most offers through September 30, 2018 with 39,215 offers.
- The University of Hawai`i at Mānoa Library in Honolulu, Hawaii posted the most needs through September 30, 2018 with 10,488 needs.

Each of these libraries will receive a commemorative certificate. A big ‘thank you’ goes to these libraries and all the other early adopters for their support and their invaluable feedback.

Learn more about the FDLP exchange, and access the site.
TX-FED experience: training

1. Directive: “Register for training”


3. Where to find more info:
   a) FDLP eXchange main project webpage: www.fdlp.gov/project-list/fdlp-exchange
   b) FDLP eXchange FAQs: www.fdlp.gov/project-list/fdlp-exchange-faq
TX-FED experience: training

1. Sandbox training (Training Site)
2. Virtual training via FDLP Outreach.
3. On-site training via FDLP Outreach. Dallas, during TLA
4. One-on-one training during Regional site visits
TX-FED experience: technical challenges

Examples of technical challenges and troubleshooting

• Loading spreadsheets into eXchange
• Notifications
• Both regionals see all available offers at the same time

Need help? Ask GPO or email FDLP Outreach
TX-FED experience: Tips

• Communicate and prepare selectives
• Emphasize the positive and the benefits
• Prioritize completing and loading Needs List
• Make use of the FDLP training and support
TX-FED experience: Q&A

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Region I Coordinator
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tom.rohrig@ttu.edu

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akent@tsl.texas.gov