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Hello everyone welcome to the FDLP Academy webinar. Using exchange in the larger multistate region. My name is Melissa Fairfield. With me is Christer Crystal Rowe, and Alisha Cooper's from the University of Minnesota. Before we get started I will walk you through housekeeping reminders. If you have questions you would like to ask the presenters or have technical issues please feel free to use the chat box located at the bottom right-hand corner of your screen. I will keep track of all questions that come in. At the end the presenters will respond to each of them. We are recording today's session. We will email a link to everyone who register for the webinar. We will be sending you a certificate of precip participation. If anyone needs additional certificates because multiple people are watching the webinar with you please email [FDLP outreach@GOP.gov](mailto:FDLP_outreach@GOP.gov). Include the title of today's webinar and the names and email addresses of those needing certificates. If you need to submit on the slides by the presenter you can click on the left side for the fullscreen button. You can click on the blue return button to get back to the default view. I will hand the microphone over to Crystal who will take it from here.

My name is Crystal Crow. On the regional coordinator for Washington Alaska for 7 1/2 years now. I'm also the deputy [indiscernible] and I fill a few other roles as well. I will talk about the history within the FDLP. Are collection and staffing and what our process used to be . My colleague will talk about our current [indiscernible] process in more detail. What we know about using the exchange. The Washington State library was designated as a federal depository in March 1858 along with a number of other state libraries. We were not a state library at the time we were a territorial library. We were included with the group designation anyway. We were designated the region for Washington in 1965 and Alaska in 1981. From 1981 until relatively recently we were the only region that accompanied two states. We currently have 25 selected depositories. 18 in Washington and 7 an Alaska. In Washington we have selected that nine out of the 10 congressional districts. We are currently lacking representation in District 4. 12 of our selective Zion Western Washington. And six are in eastern and central Washington. Alaska has one congressional district. The selectors are distributed through the state as follows. Three in Anchorage and two in Juneau and one in Fairbanks and one up and Vara. Original collection is split between two locations. We have close docs and our main building. In a storage facility. The Annex is located about a mile from our main building. The facilities house [indiscernible]. We go out to the Annex at least once a week. In our off-site storage facility we have our congressional materials. A number of dead [indiscernible] numbers that no longer grow. A random assortment of [indiscernible] are also out of the Annex. We haven't figured out exactly what's out there. Access to our collection is provided through our online catalog. We have a picker paper shelf list. When things are and not in our catalog the decisions have been made over time regarding the catalog in the government publication that has made our online catalog not a reliable source. Government publications were not catalog at all for a number of decades. We purchased a record set from a vendor and dump them into our catalog and did not take the time to actually match the record of what we own. We had records in our catalogs for things that we owned in things we don't. We encourage both staff and customers to talk to us about what they are looking for in terms of federal publications. [Indiscernible- muffled] it doesn't denote if we somehow lost or got rid of it in some other way. Either through a housing agreement or something else. In terms of comprehensiveness we are building a collection here at the state library. We do have a few selective housing agreements with our selected depositories.

Currently we have four agreements with libraries in Washington. They vary from a single title to a number of different titles and sue doc numbers. For record-keeping, in some instances we don't know exactly what we sent to other libraries. We have been working for a number of years to nail down what other libraries [Indiscernible- muffled]. It's an ongoing project. We are building one comprehensive collection for the entire region. Many of our Alaska libraries are selected and what they are collecting. They rely on us for support for more of those broader interest materials. In terms of staffing we have three people who play a role in the offers that we get here to review as a regional. I tend to do more of the coordinating of large discard projects and selected. I encourage them to contact me when they are first thinking about doing a project. I do a lot of outreach with the selective's. Carmen manages the day-to-day use of exchange here at our library. She maintains are maintained list within the exchange. All three of us do both additional work with FDLP items from processing to shelving to staff maintenance or whatever is required. As well as other duties here at the state libraries that don't touch on the federal collection. In terms of our discard process before we move to the exchange we did all of our discard list through email. And Excel attachments. If you want to include a sue doc number. Additional information was always useful if they had it. [indiscernible] could vary to a few items to thousands of items. Depending on what someone is doing. This way of doing things has its pros and cons. Individual email accounts while they are being searched. Sometimes we lost the order unintentionally. When the exchange came out we decided to jump on it. Partly because of the better tracking that is offered. We have one system where all of the offers are. We can access the information at any time. And we can pick up work for each other if we need to. Another attraction of the exchange was the opportunity gave us to standardize our practices. What the exchange requires and gave rules, and we built on that and put limits around. Which Carmen will go into in more detail. We also appreciate the automatic matching our needs. By no means do we have a comprehensive need list. [Indiscernible- muffled] from our poor record-keeping and the fact that no one knows all the publications that are part of the comprehensive collection. We are building a needs list. The ability to have them automatically matched in the exchange without us having to physically review the offers list. From libraries that are not our selective's in order to get our needs is something we very much appreciate. I will leave it to Carmen to go over the details. I wanted to mention one thing. Our guidelines have already evolved. The one change we made so far has to do with the limit. The items we allow libraries to submit at one time. We started 250 and change to 300 quickly. When we learn things like that we will adjust our guidelines to make things easier. Over time I imagine the needs of our region may change. I will turn it over to Carmen. She will go into more details about exactly what we are doing.

As Crystal said my name is Carmen Tinker. We have several guidelines in place. The total of number of offers we are dealing with. The first is that we have a 300 off the limit. We can upload 300 separate offers. They must wait until every one of those has passed into stage two before they add more. This limits the total numbers of offers at any one time. And allows us to work more fairly across all the different libraries who are offering. To print out a list and go through an initial search. Request items I need or don't need. And printout a smaller list of the more questionable items. Having that limit allows us to do the narrowing down. Without having to worry about more offers being added in the middle and confusing the dates. We also have a 60 day regional review period. In case we need it. We try to do every offer list within 30 days. If we were to receive 2000 offers the day before Thanksgiving we might need more than 30 days to get through all of them. We have that flexibility if we needed. We process items on a first in first out

basis. This means I go in a couple times a week. I look to see if the total number of items under review has increased. As it has I go to the list and verify the deify which libraries out of the newest ones. Superseded items can be discarded without using exchange. At the library checks our needs list. Some libraries only discard superseded items. This also saves us time for the total number of offers we need to work through. Other logistics we have put in place to help make things easier we have required that one volume is one offer. If the library puts up a single offer that covers 20 years of the cereal and we need only two or three's of that serial. We need to message them and say which ones we need and request the offer and to keep track of that it's also the question of what happens to the rest of those volumes? Do they just discard them? If we do one offer per volume we do not have to worry about that. It helps makes clear what exactly is being offered. We received offers for things like 191 a through 190 3F. It's not clear what is included in that. One offer per volume makes it exactly clear what we are looking for. We encourage the use of the notes field whenever possible. That's good for us to know. The know can include what was all bound together. If there are things like a duplicate item or two different titles or the same title it just clears up any kind of confusion that you might have. There's the case of certain [indiscernible]. You can put the full [indiscernible] number in the notes field with this done in the [indiscernible] field to get that excepted. We also had a discussion over win you want a library to relist an item. If there is an error in it. If there's a small typo like a zero versus a zero it is not a big deal. If we have trouble finding an item we message the library for more information. In that case we would want them to market as Captain create a new offer. We now know what that is and any other library looking at the offer at a future stage will not knowing where the line is of what you would want them to completely redo since edits cannot be made. Continuing on that theme communication is key and making things move smoothly. The messaging system in exchange has pros and cons. On the pro side it is connected to a specific offer. If you are saying you have a question about a particular item it's immediately clear which item you are talking about. We do not have to track for all of our libraries. Which employee does in day-to-day management. However, if you are talking about the entire list you need to go over general policy issues emails can be more clear than trying to message that about a single item. It does not always notify you properly or the notifications that you missed so things can go unread for a month or longer. There is no formatting in the messaging system. If you have a complicated message using bullet points you know it is better for that as well. We have a written policy that outlines those guidelines that I talked about. This is useful most to share with our selective libraries. And to reference ourselves. Some things don't come up very often. That reminder reminds us what we decided on a particular case. We have used training opportunities to help get everyone trained and on the same page. We had GPO come out and do an in person online training. We were able to go over our local policy. [indiscernible] going over those at the beginning saves everyone time and confusion. Finally the FDLP website is useful. If you have any questions over how something is working you can check the known issue longer the upcoming enhancement to see if it is a known error. There is documentation such as the data dictionary. And weekly tips that cover the most common questions. Training materials and videos and stuff like that. The things can't, GPO is helpful. While this spreadsheet not upload? You can send in an XL sheet and they will try pursuit troubleshoot. They have been very helpful in this whole process. Our contact information is on the screen. We will do questions at the end of the webinar. Feel free to email us with questions that you have afterwards as well.

Now we will turn it over to Alicia.

I think you have to pass the ball to me. I am listening in the attendees. Which makes it confusing. Hopefully everybody sees my slides now. I am really happy to talk about exchange. I am Alicia, the coordinator here at the University of Minnesota. For Minnesota Michigan and South Dakota. I have been in this position for three and half years now. We started using exchange September 2018. It has been a year and three or four months. We are finally setting and will into using the system. There is always more to learn. As Carmen and Crystal alluded to. We did about a year's worth of testing before we started exchange. It's been quite a road to get here and to get everything rolled out and moving smoothly. I'm happy to be her to talk about our process of getting to exchange. And getting to use this in our region. First, just an overview of the region and are selected's that we oversee here. I am located here. Kind of centrally. In Minneapolis. As you can tell the blue flags are all of the selective in our region. It is widespread. We are large and multi-states. A little bit of background on us we became a depository in 1907 with the land act. We became a regional in 1962. Today currently we have 69 selective in our region. That is the second most in the depository community. The first place is held by California who has somewhere in the low to mid 70s. As far as selectors go. Including ourselves there are 70 depositories in our region. For Minnesota we currently have 21 selectors. In 1988 we also became the regional for South Dakota. And currently South Dakota has nine selective's. Finally in 2013 we became the original for Michigan. Michigan currently has 39 selective's. Every 25 or 26 years we will add another state and see what happens. Quite a few selectors in our region. We think very often about how our disposal and weeding process works. Because we are working with a large amount of libraries who are actively weeding. I will say that since taking on Michigan Michigan has been, the states have done the most weeding. That is because they did not have a regional for a number of years. They came under our regional umbrella. The timing for exchange worked well and that we rolled it out about five years after we became the regional for Michigan. That gave us some time to get that backlog managed from the selective's. At this point, even back in 2018 and had planed off. We thought we were ready to move to a new system. Washington, we were also under a simple spreadsheet. Email to one of our staff members who handles the selective offers. It was a simple system then and it seemed like a good time to move to the exchange since it was being rolled out. As far as our collection here, at the University, I guess I maybe should explain our campus. We have a Minneapolis campus and a St. Paul campus. R Minneapolis campus straddles the Mississippi River. We have the West Bank and the east bank of the river. I am located in the Wilson library which is on the West Bank. We house the majority of our regional government publications collection. As well as the maps that are here and are map library. We have regional publications on our St. Paul campus and our MacGraw library. Which happens to be a selective. That decision was made because we didn't want some duplicates. The single campuses where a lot of our agriculture classes are focused. There were a few things we wanted to duplicate. That's why even though there are selectors they house regional copies as well. And we have a library over on East Bank. Walter library and they are more for the sciences. They have quite a bit of federal documents over there. They are inter-filed in the LC call numbers. It's based on subject area. Scattered across our main campus. We also have our valuable and more rare materials. Like her older serial set volumes. That type of thing and are Annex. Those are non-circulating. They are independent. They are their own selective as well. There was quite a bit of crossover between what we have in Wilson library we decided to make a housing agreement so we could have one copy. That made a lot of sense. You can tell we had regional copies based here at our campus. They are spread out. Which makes

dealing with discard lists more complicated. What helps is that we are 95% catalogs. A major part of our discard processes having are selectors check our catalog. To see if we have copies. We have been diligent. It will say my predecessor, Kristin Clark and the staff were amazing. In terms of reconciling all of our holdings with our records and making sure things are accurate. That helps not having us running all over campus checking shells constantly. That cuts down on the time that we have spent. For many regionals it makes it very important because of the space issues. Just because the preservation and access we prefer print. That comes into play with the discard process. Of course we are the copy of last resort as the regional. So we can serve our region and the selectors can feel comfortable weeding what they need to. It's not just me it is our staff that makes this work. Clarice is our main person who oversees the offers from selective in our region. She's the gal in the middle with the white card again. She has worked here for over 30 years. She is a wealth of knowledge and information. Discussing issues and how to handle things that have come up. While I'm listed as the first sort of line of contact I can troubleshoot as much as I can. And Crystal and Carmen mentioned it's nice that everything in exchange is in their. All of us can access it. It's not just going to Clarice. Whereas now I can help troubleshoot. I can also access what is in the exchange. She has a student who also helps with some of that work as well. Also Sarah deals with needs and offers for outside of our region. For things we are weeding out that are duplicates from our collection or things that we got from selective's that we ended up not needing. We will offer those out as well. She handles all of that side of it. She's the gal in the burgundy cardigan. That is most of our staff. When we have some GP librarians visit us. We are a small crew. When you think about how many selectors we are overseeing. We run a tight ship and have gotten our process to be super efficient. The exchange has worked well for us. Why do we decide to move to exchange? They seem like they were ready for a change. I think we were ready to go for that. And standardize our process. It made sure everything was in one place. Our needs list could be easily checked. Matching functionality was a big part of that. We have needs list. That one is great for a lot of the serials that are hard to make it clear in our catalog. We have noticed that has helped us. In terms of collecting offers and materials that we need from outside of our region. We had 137 matches last time I checked. Since we went live in September 2018. We do not have time to check when it was just lists on gov.L. The exchange is great because it helps encourage are selectors to offer the materials out further than just to the regional. Since they are entering things into exchange it makes it so much easier for them to add the extra steps and stages into the process. So more people are able to acquire these materials if they need it. We don't currently require any of our selective's to offer things nationally. We highly encourage it. Particularly we will work with them if they are getting rid of any materials that are being held by preservation stewards for the GPO needs. Across the board we do not require that anything is offered nationally in exchange. Finally, this is weird. With the upcoming in functionality and enhancements. The conversations about the national collection and trying to build this comprehensiveness across the entire F DLP we need a central point. In exchange for managing collections. Over all this seems to be where we are moving. We feel like we are ahead of the game. Lake Washington, we have done our best to capture all of the decisions that we have made in all the information that has gone into this disposal and weeding process. We have a pretty in-depth page that I always tell selective's is your first stop. It contains anything and everything you would want to know. About weeding. You're not having to go to 1 million different pages. Everything is contained on this page in terms of how you can weed. And our individual guidelines. And exactly how to do things in exchange. This has been great for me to reference. And capture all of those steps. So our selective's have something to always look at

when they are working on this process. It sometimes seems straightforward, there are so many caveats with weeding. We try to make it as simple as possible. Even so there is still more details that need to be hammered out. Finally I will get more into the details of how we do our discard process. There are some things we said our selectors can immediately discard without needing to offer to us. There are a few caveats. [indiscernible] by and large we are confident in our Mike refuse collection. That we do not require that. We also in our needs list, it might seem antithetical to what he needs list is. We have said on their if we have a complete set there is no question. This morning we were looking at the U.S. reports. We have a complete set and paper done. You don't need to offer those to us. Maps we handle it a little bit differently. Our mounts are held in a separate map library. For our topo maps we are confident in our set and in our series and our holdings. Just because we are the regional for Minnesota South Dakota and Michigan those we do have our selective's offered to us. Everything outside of that region they can immediately discard. That makes it a little bit easier. Finally, this is the most important step in the process. Once our selective check our catalog and that they are confident they been able to sign a copy. We are in a University of Minnesota system. We have our Rochester campus etc. If they find that they can discard it without needing to offer it to us in exchange. However, we do ask if we only have it [indiscernible] they offer it to us in paper. A few other caveats, if selectors have large runs of microfiche, we may want to know about that. Just in case we might want to take it. Depending on what it is. It might no of other libraries who want to take it just a courtesy it's good to know about those. If they are complete we want to see someone take them if they want it. The same for any titles that are being held by preservation stewards. For their digitization purposes. That we asked them to offer those out. Or I work with the selective to figure that out. And to know how to look into the exchange. To narrow down those particular titles do our best to connect our selective's. With these libraries who are doing this type of collecting. Even though we don't not require the national offering we do try to make sure some of these priority areas are met. We do not have an item or title limit. Any [indiscernible] can be offered at any time. This was new when we moved to exchange. When Michigan came under our umbrella we were getting a ton of offers. We had to limit it. We have limited our system by a [indiscernible] calendar. It went around twice per year. I think in the first month, in January you could offer a through D [indiscernible]. You would not be able to offer those again until July. We got rid of that. Since we have selective's who were holding on to one or two items for months and months. We felt able to take on a bit more. That means we sometimes get a lot of items. Especially if a library is going through a large weeding project. We guarantee an eight week maximum turnaround time on offers. Often it's quicker the lot. Clarice is in there checking for materials and printing out lists once a week every few weeks. It depends. We try to get back to them. Usually within a month. We do not use exchange for maps. Just because of how we catalog maps. We keep spreadsheets of our holdings instead. Those are a whole different ballgame. We outline on our page that are selected should contact us if they are getting rid of maps. So we can share the appropriate spreadsheet with them. Of course serials and exchange. We are doing the same as Washington is. From what I understand. It is easier if each volume is selected individually it's so hard to tell what they have. And to make sure we are getting what we need. If items are bound we want to know that. We had them list bound items. As one item with multiple pieces. Even though it might be multiple items it is listed as one item. With multiple pieces. We have them indicate they are bound together. For that it is a little bit different. Clarice goes in and she will export the list in exchange out to excel. We put those in Google drive and we organize it by the library. So we can keep track of what has been offered. Exchange does this to an extent. We also

like to have our own recordkeeping. In any given month we can get a handful of items. Sometimes a few thousand items. Will do our best to manage that. I mentioned this. Clarice goes in there fairly often. We are often troubleshooting. I mentioned selective's. We have a lot of communication. We ask that they contact us if there is anything out of the ordinary. Similar to Washington we have had some issues and some lessons learned along the way. One of the biggest problems we still deal with is with the messaging system. In exchange. The one right now we are dealing with most is that you can't see older messages past the first page. We are doing a lot of needs and offers through exchange. Most of the messaging is happening there. If the library we worked with a month ago sends us a new message that happens to be on the second page of messages. We cannot view it. Ings like that, issues with notifications in us getting the proper notifications that the other library was notified we sent them a message. We resort to an email or phone call. Once the messaging functionality gets better that will be really great. Right now we are working through that as we need to. The shipping addresses and reimbursement information is hard to get at in exchange. You have to rely on the messaging system. Sarah has started a spreadsheet tracking. This information for the selective or the depositories we are working with outside of our region. We have that so we are not having to ask or look back in the messages. You may have noticed with the way we are using exchange for selective in our region who want to offer it nationally. They still have to go through the process of us passing on it. We utilize the note field and they put in regional bypass. When we see that we know they have checked our catalog. One of the issues that we see a lot, especially with library starting to use exchange in our region, is you have that learning curve. Where you may accidentally do something wrong. Uploading a spreadsheet or something. One it's it is in there it is in there. Not being able to edit or delete entries can get a little bit frustrating. You can market as capped. It does not make it leave the system. It can clutter things up. We are still struggling on how to handle that. On our end with material that we are offering out, as duplicates or other things, if nobody wants it, and I just looked today. We have 17,000 items in there that we have offered since we went on exchange. You cannot do a batch change to say yes we discarded it. They allowed to discard. It doesn't really matter if they sit there or not. It would be nice to mark them. Since there is no way to do that it is a batch upload. Since we have so many selectors we have a drop-down menu where we can limit by selective's in our region. There is no way to see exactly which one half materials in exchange. It's hunting and pecking sometimes. To figure that out. We are looking forward to some of the updates to exchange. Like Washington we rely a ton on our documentation on our website we do training and I do a lot of consultation via email and phone about using exchange, and the process of weeding and general. I think it will always be troubleshooting and issues. As each new library uses exchange there will be new things we have to figure out. As they continued to develop exchange this will continue. It is always a learning process. And having to be okay with that and be patient. Some of our selectors, this is the first time we are using it. Keep that in mind. And we started compiling documentation. Even on the backend. And a staff member leaves we have that captured. A big thank you to GPO. [indiscernible] and Melissa Fairfield have been helpful with questions and issues. May have been vocal with problems and issues. And maintain. Generally about frustrations with exchange. A big thank you to them. To continue working with us on some of that stuff. We are excited about some of the new functionality enhancements that are rolling out. Everything but one thing I wanted is on the next rule out. That makes us happy in terms of our efficiency. Making sure our selectors can get through this process. Still making sure we are getting copies where they need to go. Of course just troubleshooting. Being okay with having to deal with problems often enough.

And being okay with that. That is all I have about exchange. I would be happy to answer any questions now. I think the same for Carmen and Crystal.

This is Melissa. I have one question that came in. This is for Carmen. Katie wants to know why did you switch from leading libraries offer 300 items at a time instead of 250?

The reason they did a little bit of a weird setting change, that happens when you are uploading spreadsheets in exchange. If it's 251 are larger on your spreadsheet you don't need to include the shipping list date. If it's small you need the date field filled in. Most of them do not track that.

Are there any other questions for any of our presenters?

Any last minute questions? I will type in the email address for us to, where you can ask questions. You can go to FDLP outreach I GPO.gov. It looks like I have a question here. To have any idea of when exchange will be functioning again? [indiscernible] I am not sure what you are asking. Exchange is functioning. Can you be more specific about your question? You can also email me directly. I will put my email address in the text chat box. If it's not working I would like to know about it so we can get it fixed.

No Melissa I have a question for you. In terms of these new enhancements and functionality that is coming out is there a date yet or any kind of a timeline?

Not yet. We are waiting with baited breath. You can email me directly and see what is going on. I want to search through here and make sure I did not miss any questions. It looks like that is it. I would like to thank all of you. Crystal and Carmen and Alicia. I appreciate this. Again, you have everyone's email addresses. The presentation will be sent to everybody who registered. Thank you all for attending. Thank you to our presenters. It was a great presentation

[Event Concluded]