Using FDLP eXchange in a Large or Multi-State Region

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• Designation date: March 1858
• Regional for WA: 1965
• Regional for AK: 1981
• Selective depositories: 25
  – 18 WA
  – 7 AK
Regional Collection & Staffing

• Locations
  – Closed stacks
  – Offsite storage – Primarily Congressional materials, Serial Set, dead Su Doc numbers, and oversize items
• Access
  – Online catalog
  – Shelf list
• Comprehensiveness
  – Trying to build a comprehensive collection at WSL, with a few selective housing agreements
  – One comprehensive collection for the entire region
• Staffing
  – Crystal Rowe – Coordinates large discard projects with selectives
  – Carmen Tinker – Manages day-to-day use of the eXchange; maintains needs list; searches offers lists
  – Laurie Fortier – Searches offers list
Discard Process

• Pre-eXchange: Excel lists via email
• Why the eXchange?
  – Better tracking
  – Opportunity to standardize practices
  – Automatic matching for needs
• Guidelines
  – Have evolved over time
Managing Many Offers

• 300 offer limit
• 60 day regional review period
• Processed on a first-in, first-out basis
• Superseded items can be discarded without using eXchange if first compared against Regional’s Needs
Other Logistics

• One offer per volume reduces confusion

• Encourage use of the notes field
  – Any good-to-know information: Locally bound volume? Duplicate?
  – Not all SuDocs accepted in Exchange: Use just the SuDoc stem, and put the full call number in the notes field

• Decide how big of an error merits the offer being re-done by Selective library
Communication is Key

• Messaging system in eXchange has pros and cons – decide when will you use it and when you will use email
• Written policy is useful to reference and to share with Selective libraries
• Training opportunities to get everyone on the same page, explain policy, and address common questions/confusions
Information and Assistance

• Wealth of information on the FDLP website: known issues and upcoming enhancements, documentation, weekly tips, training material, etc.

• Email GPO for individual assistance on any technical issues
Questions?

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