

Comment: (Steve Prine - NLS)

Welcome to everybody participating in the call. It's a nice cool fall day here in Washington. This afternoon, we're going to do some short presentations on the "three R's." Not Reading, 'Riting and "Rithmetic, as we used to say in the south, but some other "R's" and, you'll be able to identify them as you hear about them so, Karen?

Comment: (Karen Keninger - NLS)

Good afternoon everybody. It is always a delight to be able to speak with you on this Open Forum call and tell you what we know and answer questions and find out what you know so, thank you very much for participating as Steve said. We have a number of presentations, which I will start. The question has just come to me, which is, is there a working definition of Print Disabled? The working definition, I would say, is the definition that is in the Marrakesh Treaty Implementation Act, which is 17 USC §121 of the copyright law, which basically defines eligibility for our program – or will, as soon as we change the regulations. So, basically it is either A) is blind or, B) has a visual impairment or perceptual or reading disability that cannot be improved to give visual function substantially equivalent to that of a person who has no such impediment or disability and so is unable to read printed works to substantially the same degree as a person without such an impairment or disability. That's "B" and, "C" is about physical disabilities: "is otherwise unable through physical disability to hold or manipulate a book or, to focus or move the eyes to the extent that would be normally acceptable for reading." So, that is what I would consider to be a working definition of "Print Disabled." And, again, that's in the Copyright Act 17 USC §121 – and it's the definition that we will be using for eligibility for the NLS program as well.

The second topic that I have on my list is about Braille Book Review. We have gone through some changes with Braille Book Review, as you probably have become aware – including both the dearth of books, which we are going to fix – but also having to do with the order form. We are unable at this point, to do a print braille order form. It is not possible for us to get a contract to do that at this point. So, the question that we have for you – and what I would really appreciate is if you would contact your consultant with the answer to this question, and that is – "Whether or not braille order forms that don't have any print on them, could be utilized in your library." Do you have somebody who could work through the braille copy and find out what the person has marked and actually input that into the systems or not? We are debating whether to simply not have a braille order form and, ask people to send their requests in in some other format – call them in, send them in on a sheet or whatever other options they would have – or whether we need to go back to doing the order form, knowing that its only going to be in braille and its not going to have print on it. So, if you would be so good as to contact your Network Consultant and tell them whether you can use that in your library or not – or whatever thoughts you have about the braille order form. That will help us make this decision going forward. We have over the past year or so, been a lot more data-focused than we've been in the past and, David Spett would like to talk to you about some data collection that's going on. David?

Comment: (David Spett - NLS)

Thank you, Karen. Hello everyone. I have a few updates for you today on our data-gathering and surveying. On November 9, Gallup will begin to invite a representative sample of current patrons and former patrons to complete surveys – and again, the contractor conducting those surveys will be Gallup. Those selected for the sample will receive mailers inviting them to complete the survey online or by phone. It is their choice which medium is preferred – and of course, the survey is optional as well. Mailers will contain a \$1 cash incentive. If any of your patrons ask you if the survey is legitimate, please let them know that it is, and we would appreciate their response. For patrons, the survey will assess their familiarity, comfort and satisfaction with various NLS services, as well as with technology and reading generally. For former patrons, the survey will assess the reasons they stopped using library services, or why they stopped using BARD. The questions on these surveys will be different from last year's Gallup survey, but the survey methodology will be the same. We look forward to sharing results with you as soon as we're able – on both last year's surveys and this year's surveys. Last month, I spoke on our Open Forum call about our Organizational Patron survey. NLS is winding down of all our patrons categorized as organizations with an email address on file. Several of you have requested a list of all the email addresses that bounced. I'll be sending those to you in the next few days. Or, if you would like to know the results for your library and have not already requested the information, please send me an email at

dasp@loc.gov. I have received requests from a number of libraries. If you've sent one already, you don't need to resend it but, if you haven't sent one, feel free to shoot me a note. I will be also sending to all library heads – whether you request it or not – any response emails we received from patrons who requested contact information updates or, specific types of help. As many of you know, there are a number of other data-gathering efforts underway right now including ongoing work to improve our DTBM data accuracy as well as ongoing Readership and Circulation data-gathering. Of course, at any time you have questions or concerns you can reach me at dasp@loc.gov. Thank you. Back to you, Karen.

Comment: (Karen Keninger - NLS)

Alright. Our next presenter is Kristen, who wants to talk to you about our advertising. Kristen...

Comment: (Kristen Fernekes - NLS)

Hi everybody. As Karen points out, I want to give everyone a quick update on where we are with our advertising campaign for 2020. So, as I've brought up on the forum previously, we did start an all-digital campaign this year. We had intended, of course, to begin that campaign in April of this year and because of COVID and the various library closures, we did push that back and sort of rearranged the way we were approaching our advertising...which meant that we were slower at the beginning and then had a gradual uptick. Just to recap how we went through that: In June, we began our promoted keyword searches, which I know you've all heard me talk about. That means when people go and search for somewhere in the neighborhood of 100 to 120 different keywords on Google or Bing, there's an advertisement that is fed to those individuals about NLS. So, we began in June. In mid-July, we launched advertising on YouTube – so that was the first time ever that we were doing advertising on YouTube, and that performed very well. In mid-August, we launched digital advertising on Facebook, which of course, we've been doing for quite a while and it has been always very productive for us but at the same time we launched digital advertising on Instagram which is owned by Facebook. It allowed us an opportunity to diversify that outreach. The campaign has been performing very well. We've been particularly pleased with the response on the newer platforms like YouTube and Instagram...We have seen a little bit of a dip in responses and the libraries may have (noticed) that. In the past month – because there's been an uptick in the past month of political advertising – opportunities for other types of advertising get crowded out. So, if there are big advertising buys...you may not notice as many of our ads going out. One thing that we had as part of our current option year was to shoot a couple of vignettes. Basically, they're like mini video ads but the cost associated with producing them is considerably less with...like, our television ad that we did a couple years back. So, we're very pleased with those. We're just about to get the finals on that. These vignettes are intended to be extremely general. We know that videos in general, do really well online. People look for video content.

The message behind these is very general in nature. Just to give you a sense, one of them is about an individual who has macular degeneration, whose vision is declining. The other one – because we've been doing so much veteran's outreach recently – we wanted to do something that was veteran-focused, so we did a vignette around a recently-retired veteran who had come home with a traumatic brain injury. I think they're both very good. Those will be deployed as 60-second, 30-second, 15-second and 6-second advertisements, combined in a variety of different ways. Both of these vignettes are heavily focused on the use of BARD – with our digital direction in mind. This Sunday, we'll actually pause our advertising for one day because that will be the end of our Option Year 1 and going into Option Year 2. In Option Year 2, we will continue with the advertising we've been running. The great thing about digital advertising and one of the reasons it's a focus for us is because digital advertising actually learns. There's a constant assessment and re-deployment of ad dollars based on what we've come to understand for various advertisements. For the next Option Year for advertising, we're planning on doing something that we haven't really done before, which is to focus on outreach to professional groups. Within those groups the individuals would have the opportunity to amplify our message to people they're seeing on a regular basis. So that could be public librarians. That could be physicians, GPs, social workers, etc. We'll be looking at the development of those materials, but we think that that will be a good direction to go in. I can actually share some additional information as far as the actual numbers associated with the rollout of these ads since April. It's very interesting – the paid traffic to our microsite – all of our advertising drives to a microsite that is an environment specifically designed for individuals who are looking for the best information on what we offer, and enrollment – it's a simplified site... Right now, 96% of traffic to that site is driven by paid advertising – so only 4% of that traffic is organic. So that gives you some sense of what happens with our...digital advertising... I think that's it for me.

Comment: (Karen Keninger - NLS)

Alright. Well, thank you Kristen. Our next presentation is an update on the rollout of Duplication-on-Demand – David Perrotta...

Comment: (David Perrotta - NLS)

Hello. Well, I think I've touched on some of this previously but, I'll give you a quick recap and a quick update. I think I mentioned previously that we have finally been able to resume where we left off in our deployment schedule last March when the pandemic hit. So, as of August, we have been successfully getting deployments out the door to Network Libraries at the rate of two libraries per month. We're just about caught up now with where we had originally intended to be by June, before things were interrupted by the pandemic. So, we're now in the process of building out a schedule for the next six months and we have a pretty long list of interested libraries for that – but I will say that, one challenge we're facing is that – due to the pandemic – despite high interest in Dupe-on-Demand, not every library that is interested is actually ready right now to receive and setup new equipment. Some folks are having trouble with limited access to their buildings and staggered staff schedules. In some other cases, it's a question of access to I.T. support staff. So, we're working through the list of interested libraries, and essentially figuring out what's possible, who's ready to go, who may need to wait for a little while but, we know you're eager. We're eager as well and, barring unforeseen circumstances – which of course these days is a pretty big "if" - we intend to keep moving along at the rate of two Network Libraries per month and we expect that that will keep us busy at least through the coming calendar year. I think we're all just happy that we've been able to get this back on track, even though most of us who work at NLS are still working remotely. We've overcome the logistical challenges and I'm very happy that equipment is heading out the door. That's about all I've got but I'm happy to answer any questions on that.

Comment: (Karen Keninger - NLS)

Alright. Thank you, David. The next topic is mine, and it's the status of the Change of Certification for Eligibility. You may recall that last summer or spring, even, we sent out a version of the Certifying Authority list and, you weighed in on that and we adapted it to fit what you had said. It is now waiting to be published in the Federal Register, but we can't publish it until we know that BARD is in the cloud and is "load tested" to verify that it can take more activity. So, at this point in time, that's the thing that we need to get resolved. We are looking at hopefully being able to publish the change by the first of the year. We will have sufficient communication with you when that happens. You'll certainly know about it. We'll make sure that you do. The next topic is from Meredith. I don't quite understand this question so, Meredith...

Comment: (Meredith Beckhardt - NLS)

I'm not exactly sure of the question either. I want to try and just clarify some things and if this doesn't answer questions then please contact me separately. I first want to thank everybody for completing their surveys – this round of the Readership and Circulation surveys. The question had to do with the Circulation survey and the way we were asking for your digital book circulation. One question was, how much you circulated through the traditional method, where you would get books through Copy Allotment. We called that the "physical collection" in the survey. The physical DBs you have. And if it was pertinent to you, we also had a question on Duplication-on-Demand titles. This could have been through Scribe or through Gutenberg or whatever method you use. One question that was asked of Steve was "are these going to be permanent questions?" I would think they are permanent until we get through this transition. Maybe one day we will all be on Duplication-on-Demand. That won't be for quite a while. So, while we're in this transition where some people are doing the traditional method and some are doing Duplication-on-Demand, we just ask for you to separate them out. I'm hoping that answers the question out there but again, if you have any further follow up, please contact me at mbec@loc.gov. Karen, over to you.

Comment: (Karen Keninger - NLS)

Alright. Thank you, Meredith. The next topic is "Electronic Signatures." That seems to be a bit confusing on several points so, I'm going to try and clarify the issue of signing the print copies. What we intended for this is that, if – for whatever reason – the certifying authority prints the document and sends it to you in print form, then it makes sense that they would sign it – as they always have done. It's easy enough to sign the print form, etc. If on the other hand, it is not printed, and it is submitted in one of several ways electronically without being printed, then it is sufficient if they have all of the contact information. So, if it's printed – if it gets on the paper...it should be signed. If it doesn't ever get on the paper, we thought it doesn't need to be signed. Now, if

it gets on the paper and it's signed but it doesn't have all the contact information, is that sufficient? I would leave that up to the libraries, but I would assume that whatever your current practices (are) would be sufficient for that. So, I hope that clarified, and if it doesn't, we'll continue to try to make the point – to clarify it further. So, the next topic is NLS reorganization and Jason Yasner is going to present that. Jason...

Comment: (Jason Yasner - NLS)

Thank you, Karen. Hello everybody. I'm going to refer to NLS Operations Alert 20-68, that was sent to you on Monday, October 26. So, after many, many years - 4 decades about – NLS is reorganizing its internal operations. It took effect on Monday, October 26, and so we are trying to ensure that we provide better service – to both our patrons and to you, our Network Libraries. We've been working on this for a couple of years and we feel that this new organizational structure will be able to support many, many different products, services, projects and programs that we're currently running and we're hoping to run in the near future. As you all know, the braille e-reader pilot is going on, we're expanding Duplication-on-Demand, we're working on the Marrakesh Treaty pilot, we're upgrading BARD and putting it in the cloud. All of these things we feel needed resource realignment to be as successful as possible. This is all part of our modernization effort and initiative. We also feel that this increases the importance of the Network Libraries, since you guys are the ones serving our patrons directly in most cases. We're very excited about this. We have renamed our Network Division to "Patron and Network Engagement" Division to kind of show how we're looking at more focused patron and Network engagement. I welcome you all to look at the Network Library Services website, where we will be posting an organizational chart and a Frequently Asked Questions. As usual, most lines of communication will not change. If you have any questions or suggestions or issues, you should still reach out to your Network Consultants as your primary points of contact. I'll talk about the reorg in very high-level. If any questions, please reach out to Karen and myself.

At the top of the org chart is the Office of the Director. Not too many substantial changes there. The Communications and Outreach section still reports to the Office of the Director. The Senior Advisor for Planning and Innovation – that's Mike Martys – his team is still part of the Office of the Director. One thing we did – we created a new division called the Business Operations division, which is centralizing the administrative functions that were kind of scattered around NLS previously. This includes the Administrative Services section, which is about human resources mainly, financial and contract management functions and logistics and facilities – and so there are different sections now within the Business Operations division that have centralized these administrative functions. We used to have a division called the Materials Development division. We've essentially split that in half. One division that came out of it is the Collections division, which is concentrating and focusing on creating the content. Selecting it, cataloging it, producing it, QA-ing it and making it available for distribution. We have a new Collections division which is focusing on that with the various sections therein. The other part of MDD is now called the Program Delivery division. So, once the content is created – once the books and magazines are created, how do we get them to our patrons? So, the various different ways that we deliver content are now part of the Program Delivery division.

We also have a section therein that's called the Equipment and Infrastructure section – that's going to take a focus more on the equipment that we use, such as DTBMs but we have more equipment now with the braille e-readers and in the future, a next-generation Talking Book player. Any other new devices and accessories that go with it. The final division is the one you're probably most interested in – the Patron and Network Engagement division. This is the Network division, recast and refocused on better network engagement with you all and better patron engagement with our patrons. Most of the sections look the same as they did before. But we did create a new section called the Patron Engagement section. That will be focused on patron needs and training. Some of the folks that you know from the past are in that section now, such as Judy Dixon – who has been our Consumer Relations Officer (and) has been at NLS for many, many years. Donna Koh, who handles our overseas operations and, Don Olson who is mainly our BARD Support. So, we'll be standing up that new section soon and, reporting on how things are going. In conclusion, we're very excited about this. We worked on this for two years so, we want to take a look at how we can best serve our patrons, how we can work better with our Network libraries and provide the best products and services for everyone. Please check out the Network Library Services website where the org chart and the FAQs are, and get in touch if you have any questions or comments. Thank you. Back to you, Karen.

Comment: (Karen Keninger - NLS)

Thank you, David. Our next presenter is MaryBeth Wise, who is going to tell you about the conference.

Comment: (MaryBeth Wise - NLS)

Okay, hi everyone. Thanks Karen. We are pleased to announce the dates of the 2020 National Virtual Conference. It's December 1st through the 3rd – that's a Tuesday through Thursday. We're very excited that the virtual platform will enable more library staff to attend and participate in the conference. Registration... information will be posted in an Operations Alert next week so, stay tuned. Keep those dates open – Dec. 1-3.

Comment: (Karen Keninger - NLS)

Alright. We're really looking forward to this conference. We were going to have it in May and (then) September and now we're definitely going to do it and I'm still looking forward to it. So, the next topic I have on my list is a new chief for the Patron and Network Engagement division. I've been acting Chief ever since Richard left in January, and I am very happy to say that we have his replacement now, who is going to start on 9th of November. His name is Marc Santangelo (?) and you will be hearing more about him in the coming weeks. We'll do a transition and then I will cease to be the acting chief of that division – and I will be pleased about that. It's a lot of work. The last thing that I have on my list is a quick personal note – to alert the Network that I have set a date for my retirement. It's not until the end of March but, I just wanted to let you know that I have set a date. So, lot's to do before then and, we'll keep at it so, with that, Steve, I'll turn it back over to you.

Comment: (Steve Prine - NLS)

Okay. Thank you, Karen – and I guess at this point, we will open it up for questions.

Question: (Christine White - SC)

I was wondering, with NLS' virtual conference – Decembr 1-3, is it okay if Advisory Council members attend virtually? Or should it just be for Network staff?

Answer: (Karen Keninger - NLS)

I'm sure that we will have some people who are not Network staff – and if you find that it would be beneficial for the Advisory people, I don't have any issue with that.

Comment: (Christine White - SC)

Thank you very much. I appreciate that and congratulations, Karen.

Question: (John Mugford - NM)

Hi all. I'm appreciative of the updated information, organizational chart and listings. I was wondering...if it would also be possible to add the position titles of various staff? The directors and heads are identified as such – and perhaps in listing the position titles, maybe some other information such as email address and/or telephone number. I think there's been some precedent for such information in the past. I think the information could be useful going forward. Thank you.

Answer: (Karen Keninger - NLS)

Thank you, John. We'll look at the precedent and see what makes sense. Thank you.

Question: (Sharon Ruda - IL)

Hi there, everybody. I wanted to congratulate Karen. She'll be following me out the door by about 3 months, so, I'm sure she can get along without me. I just – right now – got a message from our Circulation Department that says – we're a KLAS library but I don't know if that has anything to do with it – we are not able to make labels for the six-digit books now, and Data Management doesn't know how long that will be, so we're kind of wondering what to do, I guess. Anybody have any ideas for it?

Answer: (David Spett - NLS)

We heard from Data Management yesterday that there was an issue with the six-digit book I.D.s on labels. We provided updated requirements and, we can follow up with them as far as turnaround time. I'm hoping that it will be relatively quick... If Mike Martys or Michael Katzmann has anything to add feel free to do so.

Question: (Angela Hall - AL)

Good afternoon everyone. I'm just wondering if you have considered dates for our Monthly Open Forum calls in November and December for this year. Will we only do one? If so, what about the calls with the Conference Chairs? That's it.

Answer: (Karen Keninger - NLS)

We had thought that we would have that call on December 2nd, however, the conference is going to override it. So, it's possible that we won't do a call in that timeframe.

Answer: (Steve Prine - NLS)

But we would probably – at least in November – have the Conference Chairs call.

Question: (Jill Rothstein – NY8)

Is there any thought of maybe doing a virtual orientation for new staff members...?

Answer: (Karen Keninger - NLS)

That is an excellent question, Jill. I just had a conversation with Vickie about that yesterday. Yes. We are looking at doing that. Normally we'd do it at the conference, but I think we will definitely look at doing it as a separate entity. We'll certainly let you know.

Question: (Scott Norris - MI)

Hello everybody. Congratulations Karen, on your pending retirement. My question is about the braille e-reader. It was my understanding that libraries that were not in the pilot but did have a braille collection, would receive one device as a demo device. Is that plan still going forward?

Answer: (Library Staff - NLS)

Currently we have not done that and, that was initially something that we had considered. The reason we didn't do it initially is because we didn't have both devices. We still don't have both devices, but we'll have them within the next few weeks. We can definitely consider providing a demo device of each device – for the libraries that have braille collections.

Question: (Mark Lee – PA8)

Hi everybody. Hi Karen. Congratulations on your retirement, although we're really going to miss you here at PA2A. I wonder if it's okay if I mention (an) upcoming change since there's not going to be another telephone call next month? Keri Wilkins and I are really excited to announce that throughout November and December, the Carnegie Library of Pittsburgh, Library for the Blind and the Free Library, Library for the Blind and Physically Handicapped – are officially changing our names to LAMP, which will be Library of Accessible Media for Pennsylvanians. That's a name that has been two years in the making and I know, the worst-kept secret in the Network. We wanted you all to be the first to know. I don't know if Keri is on this call but it's a lot of work. The name came up from two people who are blind – who are American Council for the Blind (ACB) members. Thanks for letting me say that. That's all I have to say on the topic. Thank you guys.

Comment: (Steve Prine - NLS)

Well, with no (more) questions appearing, I think we will end the October Open Forum call. As came up previously in the call, we will not have an Open Forum call at the end of November but, Network libraries are certainly invited to participate in our virtual National Conference, December 1st through 3rd. Thank you all for participating.