

1 **PTDLP Open Forum**

2 **11 April 2011**

3 Martha Sneed, Chris Kitchens, Lynn Donaldson

4 I. Martha Sneed welcomed everyone. She enjoyed the dialog people had on the listserv as to how to
5 have an alternative conference if it was cancelled. She is glad we are having the seminar.

6 II. Martha then commented on the introductory remarks made by librarians earlier in the day:

7 A. PubWEST interested in comments.

8 B. "Circle of trust" in Detroit

9 Tabletop discussion or in paper

10 C. Jared (Texas A&M) Board of an inventor group

11 D. Angela from Philadelphia and internal communication. Marketing not just outside but within
12 our library. Not just external. Getting the practice of it. It is important that the work we do is
13 understood by the chain of command. If you skip the internal piece, you can't do the external properly.
14 Keep doing the internal piece, too, because faces change.

15 E. Kappos is taking an interest in the Program

16 F. Ran Raider's comments about New business startups with Liberal Arts students show a great
17 direction. To "Help position a new generation of job seekers." Tools and services at our libraries are
18 excellent for them.

19 G. Marian's comments the Law School Clinical program. Will look with interest to see how that
20 progresses.

21 H. Akron's comments about the great new programs bringing in new people

22 III. Martha *How we count what we do: Metrics"

23 C. A. Framework in light of interest of Kappos in the program B. Who participated in the
24 summer meeting: Andy Wohrley, Bob Klein, Marian Armour-Gemmen, and Jim
25 Miller. Joanne Colvin planned to, but was unable to attend. Kappos said he was
26 interested in metrics because federal programs are being scrutinized

27 D. What is happening out at the PTDLs? How can we measure it? Programs are
28 being scrutinized all through the federal government.

29 a. Does the program still have validity?

30 b. Kappos supports but what do you do and how much?

31 c. We have done statistics in the past

32 IV.Roundtable in February: Bob Klein, Marian Armour-Gemmen, Jim Miller, and Joanne Colvin attended
33 in person.

34 A. 2nd effort to open up discussion

35 B. Included legal stakeholders such as the American Intellectual property organization

36 C. Los Angeles Depository Library hosted several sessions for Kappos meeting with stakeholders

37 D. Kappos is comfortable with this type of information gathering

38 E. They have looked at the information from the roundtable as well as the written comments
39 and looked at keypoints and summarized.

40

41 V. On top of that, are making an effort to Relook at the whole dissemination program

42 A. Looked at contracts

43 B. PTDL

44 C. Looked at the way work was done

45 D. Attrition of staff at PTDL

46 1. Will focus on the PTDL program to beef it back up.

47 2. Staff attrition contributed to them only being able to do the basics.

48 3. Hardly could support network of 82 libraries

49 E. Separate effort from the Director's Review / Roundtable

50 1. How to revitalize the program:

51 2 new staff: Daphne and Neil

52 2. Develop metrics to demonstrate what is happening at our libraries

53 CASSIS online it could be tracked - not very successful when CASSIS was on disk;
54 some data from pubwest

55 No data on how it is being used today

56 3. Looking at program standards

57 Receiving very few items as Depository

58 Not much in hard copy

- 59 4. Looking at changing the name of the program
- 60 a. Came out with suggestions a few years ago
- 61 Patent & Trademark Research Library
- 62 Patent & Trademark Information Center
- 63 Patent & Trademark Library
- 64 [IP voted down]
- 65 Innovation (some people like this term).
- 66 Patent & Trademark Innovation Center
- 67 b. Agency will decide
- 68 c. Might poll us during the seminar
- 69 d. Will change by end of FY2011

70

71 VI. Structure of discussion: Raise topics one by one:

72 One: Metrics

73 Two: PubWEST

74 Three: Changes to Program Standards

75 Four: CASSIS

76 Five: Internal Marketing

77 Q: Elizabeth Danley, Little Rock: Is internal marketing

78 A, Martha Sneed: Certainly

79 VII. Martha Sneed: Program standards

80 A. Fees in the statute

81 Depository Libraries have paid \$50 since 1871

82 Recently cost \$10K per library

83 Membership fee—that will remain in the standards

84 B. Pledge to Acquire 20 year backfile

85 Scratched

86 C. Make access patents freely available to public – will be reworded

87 D. Protecting the integrity of collections

88 This will be altered

89 PTDLP will Retain the right of first refusal if a library drops out of the program

90 We hope that some of you will find it in the mission of your library to retain the Official
91 Gazette, etc.

92 E. Assisting the Public – standards may “devolve”

93

94 F. Martha Sneed: We don’t think the nature of the program will change and will remain stable
95 at 70-100 libraries. Many people happy to point to the PTDL in their state/city/region.

96 There won’t be many libraries who will want to add this on program

97 **Discussion of the Five Topics**

98 Metrics

99 a. What type of data can be counted

100 b. Working groups will be convened

101 c. Have some PubWEST data

102 d. Comments

103 i. Bob Klein, Miami

104 1. Different types of libraries and administrators

105 2. Database searching (usage statistics for IP databases)

106 3. If some libraries can’t contribute then perhaps an overall average could
107 be calculated

108 4. Number of training sessions / programs held

109 5. Number of people attending

110 6. Can libraries compile these statistics? --Most people said yes

111 ii. Jan Comfort, Clemson

112 1. How about Reference Desk questions and Individual Training sessions

113 2. Most libraries indicated that they compile these statistics

114 iii. Chris Byrne, Seattle

115 1. Her library compiles “random sampling” and not daily statistics

116 2. Use software “Desk Tracker”

- 117 e. Question from Martha Sneed: Many of you are Federal Depository Libraries as well.
118 Does the Annual GPO survey mentioned by Chris ask any of these types of metrics?
119 (NOTE: from Jan Comfort: I don't think so)
- 120 f. Comments:
- 121 i. Tracy Bucknell-Holmes, Lincoln
- 122 1. Univ of Nebraska does sample reference statistics as well.
123 2. Could we also count LibGuide statistics? And chat transcripts
- 124 ii. Joanne Colvin, Baltimore
- 125 1. Hits on a website would be appropriate
- 126 g. Question from Martha Sneed: Do you all count transactions?
- 127 h. Comments
- 128 i. Bob Klein, Miami
- 129 1. Not necessarily broken down by method like phone or email
- 130 ii. Jan Comfort, Clemson
- 131 1. What about when we mention patents or trademarks during another
132 session—should we count that as an outreach?
- 133 iii. Eileen Fischlschweiger, Fort Lauderdale
- 134 1. Many times we have very detailed and complicated questions
135 2. Would it be good to give examples to show the quality of the
136 assistance?
137 3. She includes these in a monthly report to her Library administration
- 138 iv. Andy Wohrley, Auburn
- 139 1. My supervisor wants “daily accomplishments” so I keep a running
140 journal
- 141 i. Question from Martha Sneed: What should the cycle of collection be? Annual?
142 Quarterly?
- 143 j. Comments
- 144 i. Marian Armour-Gemmen, Morgantown
- 145 1. Libraries and USPTO do not necessarily run on the same fiscal years
- 146 ii. Valerie Sherman, Akron
- 147 1. We do annual statistical sampling
- 148 k. Question from Martha Sneed: We will put out a call for statistics for the latest fiscal
149 year
- 150 l. Comments
- 151 i. Jared Hoppenfeld, College Station (Texas A & M) Agrees with annual
- 152 1. Online tutorial hits
153 2. Facebook impressions
154 3. QR Codes Library 2.0
- 155 m. Question from Martha: What type of Social Media Collections do you have?
- 156 n. Comments
- 157 i. Bob Klein, Miami
- 158 1. Count circulating copies of Patent collection

- 159 2. What can USPTO collect and interpret
160 ii. Martha Sneed: we don't know yet
161 o. Question from Valerie Sherman, Akron: Can you count when the call center refer to a
162 PTDL
163 p. Answer from Donna Cooper
164 i. We ask them to use the PTDL sub
165 ii. Can track which library referred to
166 iii. Less than 40 referrals per month (but this is low)
167 iv. We need to have better reporting
168 q. Question from Esther Crawford, Houston
169 i. Do you use Website analytics
170 ii. IP ranges of PTDLS?
171 r. Comment from Robert Berry, Fairfield
172 i. Comparable / consistent statistics need definitions of terms – the crisper the
173 definition, the better the data
174 ii. Annual Cycles
175 iii. Disagreement of what counts as a reference transaction
176 s. Comment from Martha Sneed what are the parameters?:
177 i. Please count rather than don't
178 ii. Kappos sees patents have more of role than legal protection but as an engine
179 for economic growth. A more expansive definition than we might suppose.
180 iii. Information to start a small business should count

181 PUBWEST: Examples? how do you use?

182 A. Comments

- 183 a. Marian Armour-Gemmen, Morgantown: security setup only allows her to use it
184 herself – can't be made available to the public
185 b. [Valerie Sherman](#), Akron: it is a challenge to struggle for class PubWest is very
186 complicated. Keeps the computer turned off until someone insists on using it.
187 c. Hal Mendelsohn, Orlando: only use web version for teaching because they can use
188 it when they return home
189 d. Dave Morrison, Salt Lake City
190 i. PubWEST takes 2-3 days to use
191 ii. Difficult for Public Area because of firewalls
192 iii. No reason for people to come to campus – would need to create the
193 demand. This might be an opportunity as the administration is trying to
194 attract more users into the department
195 e. Comment by Martha Sneed: What would it be like if you had a laptop with
196 PubEAST
197 f. Dave Morrison, Salt Lake City

Deleted:

- 199 i. It would be great to have webinar training on topics that would be
200 broadcast only to PTDLs
- 201 g. Comment by Martha Sneed: Partnerships tried. Hard to carve out that kind of a
202 pocket when agencies want to provide equal information to all
- 203 h. Clarification by Michael Hydorn: are you having Proxy or Port difficulties with
204 PubWEST/
- 205 i. Martha Sneed: What are the barriers?
- 206 j. Comments:
- 207 i. Charlotte Erdmann, West Lafayette
- 208 1. Purdue uses Windows terminal server that can be logged onto –
209 creates another layer of logins
- 210 ii. Chris Byrne, Seattle
- 211 1. Learning PubWEST is difficult; loaded on computer at Ref Desk, and
212 patrons can't just sit down at the terminal
- 213 2. Concepts are difficult to begin with
- 214 3. PubWEST is a powersearch tool that requires technology and
215 training.
- 216 iii. Alison Bradley, Charlotte
- 217 1. Someone is telling people need PubWest but people don't even
218 understand classification
- 219 iv. Esther Crawford, Houston
- 220 1. Just had first request for EAST
- 221 2. Need better reliability for PubWEST
- 222 k. Comments by Martha Sneed
- 223 i. PubEAST is a power search tool
- 224 ii. Will be available at the Field Office in Detroit in September (?)—doesn't
225 know much
- 226 iii. Will the depository libraries receive PubEast computers
- 227 iv. Projects on books
- 228 1. Full patent download on the books for early next calendar year
- 229 2. Will be educating internally and making improvements to services

230

231 *To Be Continued on Thursday, April 14th.*

232 *Submitted by Marian Armour-Gemmen with edits by Jan Comfort.*