

# Final Report of the Maryland Digital State Publications Task Force

Updated April 2007

## About the Digital State Publications Task Force

The Digital State Publications Task Force was formed in April 2006 at a meeting of depository librarians affiliated with the State Publication Depository and Distribution Program (SPDDP). A number of participants were interested in plans the State Library Resource Center had for collecting, cataloging, and providing access to digital publications and formed a group to further examine these issues. The Task Force has met monthly, with the exception of July. Additionally, a blog was set up to share meeting notes, reports and information. The creation of such a Task Force and its recommendations was envisioned in the current SLRC Strategic Plan, FY 2006 to FY 2008 (see Appendix B).

This report constitutes a detailed written version of the presentation the Task Force gave at the November 29, 2006 meeting of Depository Libraries. At the meeting librarians were asked if they wished the task force to endorse a collaborative approach to the management of digital state publications program, where the depository libraries would have a major role, or centralized program, where the majority of work would be handled by SLRC. The librarians present endorsed a centralized approach and therefore this became the approach recommended in this report.

The Task Force unanimously endorses all recommendations in this report.

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# Introduction

Digital state publications document the history and workings of Maryland’s government. Now more than ever, transparency in government and the right of citizens to information produced by government agencies are issues that strike at the heart of a free society.

Government publications, particularly those produced by states, may appear prosaic to the casual observer: however, they are essential sources that provide fundamental information about the legal and regulatory systems that affect our daily lives. They provide a historical record of the accomplishments, problems, decisions, and workings of our state. They are used daily by state delegates and senators, judges and clerks, and Maryland state agency employees in the conduct of the people’s business, as well as by citizens of the state and indeed the world. State publications are key sources supporting research into public policies that often are tested in states before reaching the federal level. States are the building blocks of government in our federal system, and to ignore state information is to misunderstand a major component of our American democracy.

In the past two decades, state agencies have increasingly transitioned away from the once-traditional print format to the point where 80% of state publications received by the State Publications Depository and Distribution Program (SPDDP) are also available online.<sup>1</sup> Although state government agencies have posted many digital publications on their public web sites, the “shelf life” of such publications is limited as the web sites change. Unless copies are saved—either in digital or print form—digital publications effectively cease to exist when they are removed from agency web sites.

Historically, the responsibility of collecting state publications has fallen on the State Library Resource Center (SLRC). Through its State Publications Depository and Distribution Program, SLRC is statutorily mandated to collect state publications *regardless of format* (see Appendix A). However, SLRC does not collect state publications in digital format, nor has it adapted the SPDDP model, which was designed to collect and distribute print publications only, to collect publications in digital format (see Appendix C).

Because of the enormous potential consequences to Maryland state government of the permanent wholesale loss of its digital publications, in April 2006 representatives of the Maryland Depository Libraries formed the Digital State Publications Task Force to assist SLRC in the development of a plan to collect, catalog, and preserve digital state publications.

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<sup>1</sup> A review of the July 2006 Depository List of publications sent to depository libraries by SLRC revealed that 83% of titles were available online. The task force suspects that there are many publications not received by the SPDDP or are solely available online.

Over the course of seven months, Task Force participants investigated the challenges, issues, and options that Depository Libraries face in managing digital state publications. The Task Force solicited a wide range of opinions and experiences from leaders of similar programs in other states to identify a feasible approach for managing a collection or collections of digital state publications.

The Task Force quickly concluded that state agencies lack the resources and do not consider it as their mission to send either the digital publications themselves or their uniform resource locators (URLs)—their “web addresses”—to SLRC. Furthermore, the Task Force learned that Depository Libraries have insufficient staff to manage even those few print publications that they currently receive—to say nothing of a massive influx of digital materials that they might be expected to collect in the future. In many cases, print publications are not being cataloged or added to the member Depository Libraries’ collections, either because the publications are not significant to the library’s mission or because the library lacks the necessary cataloging staff.

Taking all these factors into consideration, the Task Force concluded that the opportunity exists for SLRC to exercise a leadership role in reconstituting the SPDDP as a program that actively collects digital state publications. Furthermore, the Task Force unanimously concluded that such an active approach would necessitate centralized collection, cataloging, access, and preservation (see Figure 1).

Based on the recommendations of the Depository Libraries this report endorses a centralized approach to managing state publications. It recommends that SLRC embrace, fund, and adequately staff a program to manage digital state publications. This report analyzes the four functional areas that must be addressed to ensure the successful implementation of a digital state publications program:

- Program Leadership
- Collection Development
- Cataloging
- Access and Preservation

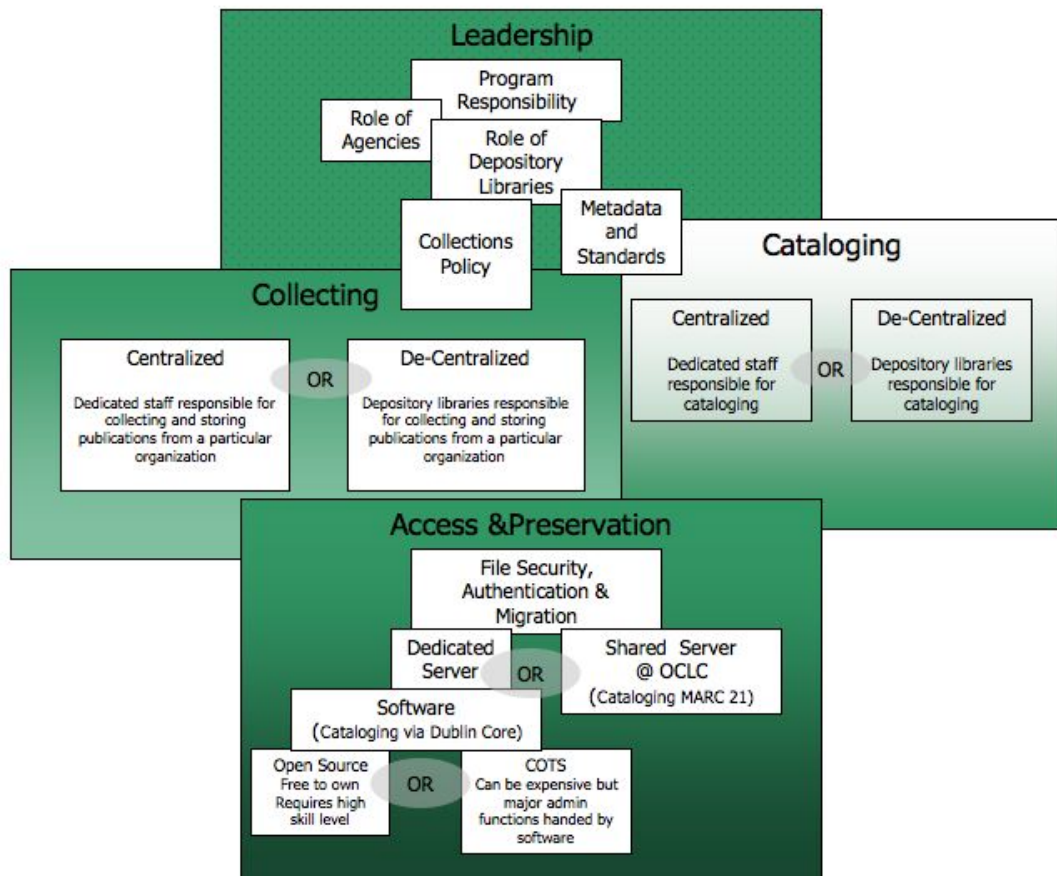


Figure 1: The four factors affecting the collection and management of digital state publications





# I. Program History and Funding

**Key points:**

- Maryland law requires the collection and distribution of state publications.
- The State Publications Depository and Distribution Program has struggled to meet its goals due to unstable funding.

Since 1844, the Maryland Historical Society has acted on the vision of preserving and sharing the rich history and culture of Maryland. Although laws had been enacted in 1692, 1716, and 1742 to insure the safety of public records, political whims, poor storage conditions, and natural disasters took their toll. In 1834, David Ridgely, the first appointed State Librarian, by order of the Legislature, undertook the task of examining both manuscripts and published works throughout the State and issued a detailed report on their storage and care. The Maryland Historical Society built on his work and began the process of collecting the scattered materials, even purchasing from private collectors those items deemed essential.

Many obstacles loomed on the horizon. Indeed, J. Thomas Scharf, the Commissioner of the Land Office of Maryland from 1884-1892 was a well-known collector *and* re-seller of historical documents. In 1891, he “donated” a large portion of his collection (with a reversion provision) to the Johns Hopkins University Library. During his tenure and scholarly research, another large percentage of state publications ended up in the Library of Congress. In 1971, after a 35-year effort by local archivists, the Library of Congress returned its holdings to the State’s Hall of Records, the predecessor of today’s Maryland

Governments must be seen to exist. They publish numerous records of their activities as a way of establishing and validating their existence. Presumably, the documents they issue are meant to be read, at least by those for whom they are intended. Certainly they are meant to be retained, and implicit in their preservation is the act of retrieval. Whether written for the few or the many, whether issued in small or in large quantity, and whether deposited in one place or a number of locations, publications of governments are putatively a matter of public record. But access to this record is often more a theoretical ideal than a matter of easy right.

As governments are impelled to publish and obliged to disseminate symbolic evidence of their claim to legitimacy, institutions such as libraries are required, by regulation and by professional mandate, to house their publications and to make them available to all who have a need to know. But the manner by which the former is accomplished effects significantly the means of executing the latter. Librarians may have a small voice in changing the odd and often inscrutable way in which governments choose to reveal their actions through their published records, but they are pledged to employ all necessary measures to insure reasonable control and access.

Morehead, Joe. Introduction to United States Public Documents. Littleton, CO: Libraries Unlimited, Inc., 1975. p. xxiii.

State Archives. Also in 1971, the legislature designated the Central Library of the Enoch Pratt Free Library as the State Library Resource Center (SLRC) under the Education Article of the Maryland Code.

### The State Publications Depository and Distribution Program

The 1979 General Assembly created a Governor's Task Force on Documents.<sup>2</sup> The Task Force was charged with streamlining the statute then governing state publications, which lacked a centralized bureau or department to manage the collection of publications distributed by state agencies.<sup>3</sup> That Task Force developed additional legislation that led to the formation of the Commission on State Publications Depository and Distribution Program (SPDDP), as well as the Program itself, headquartered at SLRC.<sup>4</sup> The statute exists today in large part as it did upon enactment in 1982. Shortly after the creation of the SPDDP, the Enoch Pratt Free Library conducted an open search for the Program's administrator and the recommendation of the Search Committee was accepted at a meeting of the Commission.

In January of 1983, funds were transferred from the Board of Public Works to the Department of Education so that the Program could begin in the middle of the fiscal year. The administrator, reporting to the Director of the Enoch Pratt Free Library and to the Commission, began sending letters to all state agencies informing them of the new law and their obligations to send copies of their publications to SLRC. Within only a few weeks, fifteen agencies had been contacted and three shipments of publications had been sent to the Depositories.

### Precarious Funding

Even with its modest expenses and very low institutional overhead, the separate line item in the State Department of Education's budget for funding of the SPDDP was eliminated in 1991. Robert C. Murphy, Chief Judge of the Maryland Court of Appeals, wrote to then Governor William Donald Schaefer requesting that Program funding be continued. Governor Schaefer replied that he had tried to save the Program (and others) by proposing the Tax Fairness Act of 1991, which the General Assembly neither debated nor passed. After state funding was eliminated, the Enoch Pratt Free Library maintained elements of the program, assigning staff to work on the essential tasks of distributing state government publications. In 1996, the Commission on State Publications Depository and Distribution Program was eliminated.<sup>5</sup> The SPDDP no longer operates under the

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<sup>2</sup> Joint Resolution No. 19, 1979 Laws of Maryland, page 2169.

<sup>3</sup> See Maryland Annotated Code art. 40, § 53 (1978 replacement volume).

<sup>4</sup> 1982 Laws of Maryland, Chapter 912.

<sup>5</sup> 1996 Laws of Maryland, Chapter 341. It is interesting to note that although the Commission was elsewhere eliminated from the statute, the current text continues to reference the Commission as the authority for designation of Depository Library status.

auspices of that Commission, now operates within the Pratt Library's Information Access Division, with informal input from member Depository Libraries.

In 2002, Robert M. Bell, Chief Judge of the Maryland Court of Appeals, wrote a letter to Dr. Carla Hayden, Executive Director of the Enoch Pratt Free Library, urging that the SPDDP be reinvigorated. Dr. Carla Hayden responded to the letter describing the current efforts of the Library staff to collect state documents and make them available to citizens, while explaining that SLRC operated under an annually negotiated contract. Following significant input from many segments of the library community (see Appendix C) the SLRC Contract Oversight Commission approved an allocation of SLRC Per Capita funds for the continuation of basic SPDDP services

### Critical Juncture

The history of the SPDDP demonstrates a crucial problem with the Program. Although SLRC is required by state law to distribute publications regardless of format there has been a significant lack of political will to restore and provide adequate funding for the Program as originally prescribed through a separate line item in the Maryland State Department of Education's budget. If it were not for the intervention of the library community and the judicial branch, the Program would have died years ago.

The program is now at a critical juncture. At present the SPDDP only distributes print publications. Agencies are now posting online, rather than printing, an increasing number of their publications. The Task Force estimates that at this time over 30% of state publications are only available online<sup>6</sup>. Because this number is expected to grow, the Program is again in danger of not fulfilling its legal obligations because it does not yet collect digital state publications.

### Recommendations

1. The SPDDP should have its own "line item" in the SLRC budget. Additionally, all expenses for the program should be visible and transparent to both the advisory committee and the library community.
2. The SLRC should devote at least 5% of its budget during its next budget cycle for activities outlined in this report thus funding the creation and operation of the proposed system.

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<sup>6</sup> In the last six months the Maryland State Law Library collected 320 individual state agency publications. Of these publications 210 have print equivalent and 110 are only available online.



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## II. Program Leadership for a Digital Age

### Key point:

- The state digital publications program requires a committed organization with stable funding and program oversight.

### Background

The SPDDP's original premise—to distribute paper copies of state agency publications to member Depositories—serves as the foundation for the SPDDP's current iteration. As such, there are rather modest expenses and low institutional overhead costs. The primary components include staff salaries and office and storage space.

By contrast to a print distribution program, a digital preservation initiative, by its very nature, necessitates a greater investment in both human and technical resources. For example, leaders of the initiative would be tasked with the purchase and implementation of hardware and software. Daily management of such an initiative, as envisioned in this report, draws on enhanced professional expertise, such as detailed publication cataloging and interface design. The resources and the skills needed by staff for a digital initiative are quite different from those necessary to operate a print distribution program. Therefore, it is important to determine whether the current structure of the SPDDP is a sturdy and flexible framework on which to build a digital repository.

### Leadership Characteristics in Other State Depository Systems

An analysis of digital state publications programs indicates that approximately ten states have begun implementing systems that preserve digital material. Most of them have three features in common. First, vigorous, centralized leadership commands nearly all of these digital repositories.<sup>7</sup> Second, outdated statutory provisions, focused primarily on print

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<sup>7</sup> Connecticut (<http://www.cslib.org/depositprog.htm>), North Carolina (<http://statelibrary.dcr.state.nc.us/dimp/index.html>), Illinois ([http://www.cyberdriveillinois.com/departments/library/what\\_we\\_do/depository\\_programs/home.html](http://www.cyberdriveillinois.com/departments/library/what_we_do/depository_programs/home.html)), Michigan ([http://www.michigan.gov/hal/0,1607,7-160-17449\\_18637\\_18651-155710--,00.html](http://www.michigan.gov/hal/0,1607,7-160-17449_18637_18651-155710--,00.html)), Oregon (<http://www.oregon.gov/OSL/GRES/REPOS/index.shtml>), New Mexico ([http://www.stlib.state.nm.us/services\\_more.php?id=191\\_0\\_13\\_0\\_M64](http://www.stlib.state.nm.us/services_more.php?id=191_0_13_0_M64)) and Arizona (<http://www.lib.az.us/diggovt/>) are all states that have strongly centralized authorities responsible for digital state publications repositories. Texas (<http://www.tsl.state.tx.us/statepubs/index.html>), has in place a robust state agency website search interface, but has only recently begun to address preservation issues. Presumably, this initiative will be

distribution, do not seem to impede the digital preservation progress made by these robust institutions. Third, the centralized leadership has always undertaken the task of acquisitions. Other state depository systems typically have not ceded to Depository Libraries the role of acquiring print or digital state publications.

### **Centralized Leadership**

Most often, digital preservation leadership stems from a strong state library institution. This “top-down” approach leverages the twin characteristics of these entities: institutional memory and political clout. Generally speaking, a single authority needs to consult with fewer stakeholders in order to plan internal projects. Additionally, library staff can rely on their own professional experience in creating programs, many of which are highly respected by other government officials. All of these factors, in turn, often make action and success happen relatively quickly.

Unlike strong depository programs operated by other state libraries, the SPDDP’s unstable history precludes it from having either political or institutional capital to exercise in the advancement of a digital initiative. Unlike those states building digital programs under state library authority, the SPDDP would be starting almost from scratch.

This Task Force’s predecessor, the State Publications Advisory Committee, noted the need for strong leadership when it wrote, “The Committee concludes that the State Publications Collection and Distribution Program must have strong and consistent leadership from both SLRC and from the collective knowledge of other state publications professionals and stakeholders statewide.” (See Appendix C.)

### **Statutory Authority**

In other states, the statutory authority granted to the state library for state publications depository programs is not determinative of the success of their digital repositories. Of the states surveyed, only three have statutes specifically addressing the collection of digital state publications.<sup>8</sup> Three other states that have embarked on digital repository projects continue to operate under statutes that define publications as being print-based.<sup>9</sup> North Carolina and Wisconsin have statutes affirming that publications may be in any

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operated in a centralized fashion. The New Jersey State Library, another centralized entity, ([http://www.njstatelib.org/Collections\\_and\\_Services/NJ\\_Government.php](http://www.njstatelib.org/Collections_and_Services/NJ_Government.php)) also has made some progress in the digital preservation area. Only Wisconsin (<http://dpi.wi.gov/rll/wddp-digitalarchive.html>) operates under a collaborative, shared framework for managing a digital repository pilot program.

<sup>8</sup> Illinois (15 Illinois Compiled Statutes 320/1 et seq.), Texas (Vernon’s Texas Statutes and Codes Annotated, Government Code §441.101 et seq.) and Oregon (Oregon Revised Statutes §357.001 et seq.) have recently revised their state publications statutes to acknowledge the unique circumstances surrounding the collection and distribution of digital publications.

<sup>9</sup> See, for example, the state publications statutes for Connecticut (General Statutes of Connecticut § 11-9b et seq.), Michigan (Michigan Compiled Laws § 397.19), and New Jersey (New Jersey Statutes Annotated § 52:14-25 et seq.).

format, even though the statutory framework for both of these states outlines depository systems primarily concerned with print publication distribution.<sup>10</sup> New Mexico does not define the formats of the publications to be distributed, but it does require the deposit of a certain number of copies.<sup>11</sup> Arizona lacks a comparable state publications depository program, although its State Library is charged with maintaining current and historic collections of state documents.<sup>12</sup> Therefore, inexact statutory language did not seem to hinder the development of digital preservation systems.

Maryland's statute is not much different from those in several other states. Here, as in North Carolina and Wisconsin, the authorizing statute is concerned primarily with printed materials because of its focus on physical distribution, although as already noted the law specifically states that publications should be deposited "regardless of format." In fact, Maryland's statute is much more apposite than those of Connecticut, Michigan and New Jersey. Therefore, based on other states' examples, Maryland's statutory structure should not impede the creation of a digital repository for state publications. No law precludes the SPDDP from undertaking any type of digital state publication initiative. Nevertheless, more clearly defined legislation, perhaps based upon the recently revised statutes in Illinois, Texas or Oregon and written specifically for digital publication dissemination and preservation, would be beneficial.

### **Role of Depository Libraries**

In all other states but one, smaller depository libraries do not undertake the collection role that has been reserved by the state library.<sup>13</sup> Instead, the leadership of the depository system at the state library historically has performed this task, which continues with the collection of digital state publications.

By contrast, Maryland's current depository structure possesses an additional element, not found in most other states. Because the SPDDP acquired and distributed fewer and fewer titles each year over a fifteen-year period, many Depository Libraries in Maryland actively collected state publications during this time. Because the rebirth of the SPDDP was only very recent, and because it does not yet acquire digital publications (see Appendix C), at least four Depository Libraries have begun collecting digital

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<sup>10</sup> In North Carolina a "document" is defined as "any printed document, including any report, directory, statistical compendium, bibliography, map, regulation, newsletter, pamphlet, brochure, periodical, bulletin, compilation, or register, regardless of whether the printed document is in paper, film, tape, disk, or any other format." (General Statutes of North Carolina § 125-11.6(2)) Wisconsin's provision is similar, but somewhat more succinct: "'State document' includes every publication produced by a state agency in multiple copies or prepared for a state agency in multiple copies by a private individual or organization that is supported wholly or partly by any funds appropriated by this state, regardless of the format or process by which produced...." (Wisconsin Statutes § 35.81(3)).

<sup>11</sup> See New Mexico Statutes § 18-2-4.1.

<sup>12</sup> See Arizona Revised Statutes § 41-1338 et seq.

<sup>13</sup> Wisconsin (<http://dpi.wi.gov/rll/wddp-digitalarchive.html>) is unique among the other states in that it employs a collaborative, shared framework for managing a digital repository pilot program.



publications, which would otherwise be subject to the risk of loss given current SPDDP operations. The Department of Legislative Services Library, the Maryland State Law Library, and the University of Maryland Libraries at College Park actively acquire and fully catalog some digital state publications. Additionally, the Maryland State Archives comprehensively acquires digital state publications, but does not catalog them in MARC format.

One consequence of this history is that there is significant overlap and duplication among libraries in the collecting and cataloging of state publications. The other outcome of this situation, however, has generated a much more positive possibility—experienced Depository Library staff can offer useful expertise in the implementation and management of a collaboratively operated digital repository.

### Factors Necessitating a Comprehensive Examination of Program Leadership

Maryland is at a decision-making crossroads unlike many other states that have instituted digital state publications programs. Because the SPDDP is not yet collecting digital materials, Maryland has an opportunity to first reconsider which entity should hold the responsibility for the creation and maintenance of a digital repository. Because Maryland lacks a dominant state library agency, and because Maryland Depository Libraries play a crucial role in publication collection, as compared to other states, Maryland has a choice to make. It could choose to foster a collaborative, shared, multi-institutional framework for creating a viable digital program. Alternatively, it may decide to adopt the approach favored by most other states and vest the decision-making authority for the digital preservation initiative with a single agency.

### Examination of a Collaborative Leadership Approach

A collaborative approach could operate in a number of ways. For example, Depository Libraries could form a consortium to operate the depository program and its digital repository. This consortium would have a spectrum of management structures at its disposal. On one extreme, the consortium could be quite large and professionally staffed to manage all the day-to-day functions of a digital state publications program, with the end result being that there would be no active role for Depository Libraries beyond “high-level” management. At the other extreme, the consortium could be more modest, creating guidelines and standards for depository library involvement, with each Depository Library actively maintaining its own preservation-oriented database in a loosely networked fashion. A centrist approach would have the consortium operate a single database, but with guidelines for Depository Library input and cooperative management.

The advantage of a collaborative approach is that Depository Libraries would continue to share fully in the responsibilities and status of managing a state publications system, mirroring their traditional activities in the print-based world. Unless Depository Libraries

are provided a role in the management, publications identification, collecting, cataloging or storing process of a digital system, there is otherwise little for them to do.

Nevertheless, a collaborative model is only as strong as its weakest member. If a budgetary or staffing crisis arose at a member depository, the overall effectiveness of the entire program would be diminished. Furthermore, at a meeting of Depository Libraries held on November 29, 2006 the participants confirmed that their respective institutions did not have the resources to share responsibilities for program tasks—even if that meant an end to the “traditional” depository system. Rather, the overwhelming preference of the attendees was for a single institution to oversee a digital state publications program—the model used by other states that operate successful digital repositories.

### Examination of a Centralized Leadership Approach

If the depository library community prefers a centralized approach, the question then becomes: Which institution should be responsible for the creation and maintenance of the program? Currently, none of the most active Depository Libraries has the resources to undertake this significant mission. While the Maryland State Archives has a legal obligation to preserve materials, they do not have the resources to individually catalog in the MARC format each publication, as is currently done now by other Depository Libraries for print materials. Moreover, the Task Force envisions the continuation of a print distribution system for a select group of the most important state agency materials. Having two agencies in charge of distributing the same materials could prove to be quite cumbersome in practice.

One alternative would be the creation of a new statewide Task Force or agency to oversee the program. An advantage to this approach is that a revised statute might be the result of significant political discussion and support by legislators and community leaders, thereby strengthening the program and providing recognition of the challenges it faces. Another advantage is that it does not saddle SLRC with administrative responsibility. However, this approach requires a great deal of legislative work to establish a new entity. Given that legislative priorities and resources lay elsewhere, it is not likely that this approach can be undertaken in the immediate future.

The SPDDP continues to be a viable option for the operation of a digital repository. The SPDDP staff, for example, already knows many of the challenges posed by digital preservation, as well as the needs of the library community and its users. If the SPDDP disseminated both paper *and* digital state publications—and preserved the latter—there certainly would be a sense of historic continuity, even though that link is somewhat tenuous at times. Additionally, no additional legislation would be necessary to authorize the SPDDP’s role in digital preservation. While the policy-making underpinnings of this approach are solid, the funding, staffing and execution of this approach are likely to be somewhat problematic.

As outlined elsewhere in this report, the SPDDP must undertake ambitious planning and implementation, requiring a substantial budget. However, the SPDDP currently lacks

both the budgetary and staffing resources that will make a digital state publications program successful. The Task Force recommends that at least 5% of the SLRC budget be allocated to the SPDDP. The SPDDP is the only SLRC program comprehensively defined in detail by statute. Therefore, the SPDDP must be the last place to go—not the first—if budget cuts are forced on SLRC.

Additionally, SLRC should create an efficient managerial structure for the digital state publications program. As suggested by the Depository Librarians, the primary attraction of single-entity management is the ease with which this institution could create and maintain a single repository. While that task sounds simple in the abstract, the implementation of such a vast system as envisioned in this document is likely too large an effort for the limited number of SPDDP staff, few of whom are trained in digital preservation practices.

Therefore, in the near term the SLRC should look elsewhere for assistance in the creation and operation of a digital state publications system. Based on previous and widely accepted library practices, it should seek two types of partners.

First, outsourcing is a viable management tool when resources are not available at the institution responsible for fulfilling a requirement assigned to it. Private, commercial vendors and other libraries both might offer expertise at a reasonable cost, based on an open bidding process.

Second, an advisory committee would provide community and professional input. This approach would be especially beneficial here because those librarians providing state publications directly to the public would be quite knowledgeable about the public's information needs. Depository Librarians' expertise would ensure the ongoing adequacy of the system itself as technology progresses. This committee also would be called upon to develop guidelines for acquisitions, cataloging and the selection of technology platforms, as described elsewhere in this report.

## Recommendations

The Task Force makes the following recommendations:

1. The SPDDP should continue to have responsibility for the development and maintenance of a digital state publications repository.
2. The SPDDP should be given adequate budgetary, staffing, and hardware and software resources to make such a program successful.
  - a. SLRC should strongly consider putting out for formal procurement bid the management and staffing of the proposed system.

## II. Program Leadership for a Digital Age

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3. A new advisory committee, patterned after the Library Services Advisory Committee (LSAC) and including Depository Librarians, should be formed in order to validate the funding increase and guide the management of the SPDDP.
4. The advisory committee should consider at a later time whether the Program would benefit from minor statutory changes, such as stronger emphasis on the management of digital materials and the deletion of the outdated reference to the “Commission.”

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### III. Establishing a Collection Development Policy

**Key points:**

- It is not necessary to collect every state publication.
- A collection plan can help identify important publications.
- An advisory committee should develop the core collection.
- Depository libraries can expand on the core collection and add to the repository.

#### Current Situation in Maryland and Other States

The current legal framework and practice in Maryland establishes only a rudimentary collection policy for state publications. The definition of a state publication under § 23-301 of the Education Article in the Annotated Code of Maryland (see Appendix A) states simply that state publications are “informational materials produced, regardless of format, by the authority of, or at the total or partial expense of any state agency.” The definition excludes correspondence, interoffice and intraoffice memoranda, routine forms or other internal records, but the potential windfall of digital information covered by this definition is staggering in its implications.

In actual practice, the SPDDP has depended on state agencies to decide what constitutes a state publication. The staff of the SPDDP is diligent in prodding agencies when they have failed to send copies to SLRC for distribution, but in essence, the collection policy for Maryland is passive in nature. If a state agency deems something outside the scope of its understanding of the collection policy, then it is unlikely that it becomes part of the SPDDP.

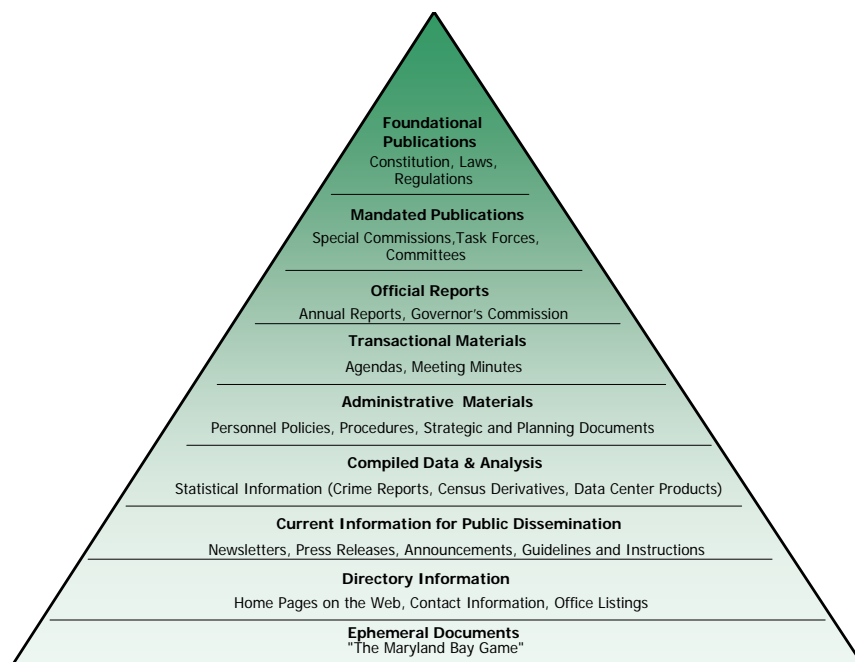
The situation becomes more complex in the digital context where anything on a state agency web site as well as a growing variety of information stored on spreadsheets, databases and other digital platforms might be considered a state publication. In addition, the new digital environment has fundamentally altered the concept of publishing in both paper and digital formats. Now any state employee with access to standard office software and a photocopier is able to produce a publication. If the employee has access to the agency web site, then the scope of distribution for the publication is dramatically expanded. This decentralized system stands in sharp contrast to the earlier model where only a few printing outlets limited the potential sources of distribution.

The alternative to capturing all digital information produced by Maryland state agencies is to create a collection policy that establishes guidelines for deciding what to include in the digital repository. An essential first step is to define what constitutes a digital state publication. The Maryland Digital State Publications Task Force examined the process in other states and found two ways to approach this problem. Texas and New Mexico use

their respective state laws for state publications and apply these legal definitions in the digital context.<sup>14</sup> Any policy for Maryland digital state publications will interpret current statutes governing the SPDDP and apply them to digital publications, but such an approach still leaves wide latitude for those deciding what to include in the digital repository. In the words of the Texas manual, "...anything on a state agency's public web site or a web site contracted by a state agency is considered published."<sup>15</sup> In order to further refine such an expansive definition of state publications, states such as Texas have created collection policies that list the types of publications eligible for selection into their digital depository program.<sup>16</sup> The Texas example of 30 publication types gives clarity to the universe of information selectors should seek to capture, but this list provides only marginal help in designing a program whose goal is to insure that the most essential state publications in digital formats are captured, preserved and made available to users.

## Hierarchy of State Publications

The Maryland Digital State Publications Task Force has adopted a model that organizes state publications according to their relative importance (see Figure 2). This hierarchy embraces print and digital formats of state publications and recognizes that certain



**Figure 2: Hierarchy of Publications**

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<sup>14</sup> "What is an electronic 'publication'," Electronic Liaison Reporting Manual, Texas State Library and Archives Commission <http://www.tsl.state.tx.us/trail/manualp6.html> (viewed on January 12, 2007); "State Documents Digital Archive Collection Development Policy," New Mexico State Library <http://www.stlib.state.nm.us/DigitalArchiveCollectionPolicy.htm> (viewed on January 12, 2007).

<sup>15</sup> "What is an electronic 'publication'," <http://www.tsl.state.tx.us/trail/manualp6.html>

<sup>16</sup> "Publication Types to be Included for Selection," Collection Development Plan: Selecting Texas State Documents to be Included in the Electronic Depository Program, Chapter 5.2 <http://www.tsl.state.tx.us/lot/collectiondevelopmentplan.html> (viewed on January 12, 2007).

categories are more critical to users. Grouped into nine classes of publications, a graphic representation of the hierarchy forms a pyramid with the most important types of publications at the top.

By ranking state publications according to their importance, a collection policy for a digital publication repository would establish priorities for selection. Assuming that the resources for a digital repository are finite, publications that fit into the higher levels of the hierarchy would be collected before those lower on the pyramid. Some of the least important publications might not be collected at all, or captured selectively to preserve a representative sample of a genre of publication. Focusing on the most important publications insures that the digital repository responds to the public information needs of Maryland's citizens while making the best use of available resources. In addition, digital formats lend themselves to broader collecting and wider distribution to users.

### The Core Collection and Beyond

The state publications hierarchy also provides a model for how a digital repository could operate in Maryland. An advisory committee to the SPDDP would develop a collections policy and conduct periodic reviews of state publications in digital formats. This advisory committee would decide on the core collection, based on its assessment of the significance of various types of publications at all levels of the hierarchy and on its knowledge of the resources available for capture, cataloging and distribution (see Figure 3). The SPDDP would then concentrate on the various steps needed to deposit the publications of the core collection into the digital repository.

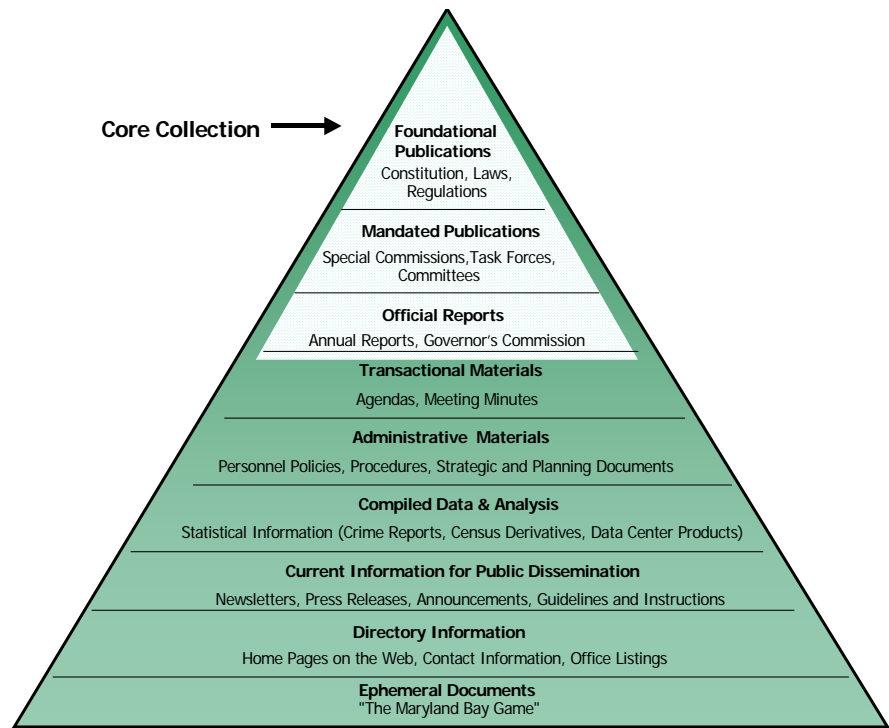


Figure 3: Core Collection

This core collection would constitute the essential body of state information in digital form that would be permanently preserved in the state digital repository and made



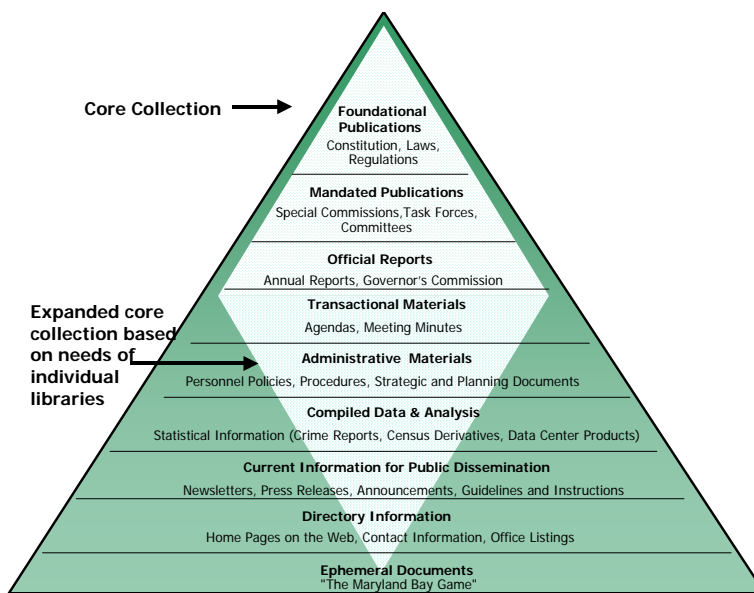
available to anyone with access to a computer. A graphic representation of the core collection would be a triangle within the state publications hierarchy pyramid, where everything within the triangle falls into the core collection.

However, the state repository would not be limited to just the core collection. Officially designated state Depository Libraries whose patrons' research interests or mandated responsibilities require more extensive holdings of digital state publications would be free to devote their

resources to identifying, capturing, cataloging, and preserving of additional state publications outside the core collection outside the core collection (see Figure 4). The Depository Libraries could collaborate in designating sectors of the state government they would monitor for hidden or underappreciated publications. If a depositor library

desired to collect additional publications, it would follow the same protocols for cataloging and description used by the SPDDP to manage the core collection and the repository.

A procedure could be developed whereby individuals outside of Depository Libraries could "nominate" publications for inclusion in the repository. This model of participatory contributions from a community of knowledgeable experts on state information embraces an emerging consensus on new potentials for web-based services.<sup>17</sup> The Maryland digital state publications collection can be viewed in this light as a core collection supplemented by the contributions of state Depository Libraries and interested individuals who assist the SPDDP in creating and preserving an essential body of knowledge. Figure 4 shows one such expanded digital collection.



**Figure 4: Library Core Collection**

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<sup>17</sup> Many of those writing about the emergence of new ways to use the web have adopted the term "Web 2.0" to designate the next generation of web services. A useful summary of this concept can be found at: "Web 2.0," Wikipedia [http://en.wikipedia.org/wiki/Web\\_2.0](http://en.wikipedia.org/wiki/Web_2.0) (viewed on January 16, 2007).

The collection policy would have significant implications for the concept of a depository library. For the near term, Depository Libraries will continue to receive paper publications. The Task Force expects, however, that most state information will be published in digital formats in the coming years. Whereas the previous system made depositories passive recipients of state publications, the new approach establishes Depository Libraries as participants in a digital community. We believe this new model will help avoid a past weakness where the depositories had virtually no stake in the success of the central collecting and distribution agency.

## Recommendations

1. A collection policy for digital state publications in Maryland must be developed and implemented. Creating this collection policy will be one of the first essential responsibilities of the SPDDP and the digital state publications advisory committee.
2. The collection policy would:
  - a. Define state publications in the digital context
  - b. Establish best practices for identifying digital state publications
  - c. Establish the hierarchy of digital state publications
  - d. Outline the responsibilities of the SPDDP for managing the digital repository
  - e. Define the duties of the advisory committee in two key areas: creating and monitoring the core collection, overseeing the work of the SPDDP
  - f. Establish qualifications and responsibilities for Depository Libraries wishing to participate in the digital repository
  - g. Create guidelines for individuals wishing to nominate state publications for inclusion in the digital repository
  - h. Create a mechanism for vetting nominated publications

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## IV. Collecting Digital Publications: A Case Study

### Key points:

- The print publication model does not work for digital publications in practice.
- Libraries must actively seek digital publications based on their collections policies.
- Collecting digital publications is challenging.
- New technologies are making the collection process easier.

Maryland state agencies post a significant portion of their publications online.<sup>18</sup> Because the SPDDP is designed to handle print publications only, fewer and fewer publications are sent to SLRC. Because “the average lifespan of a webpage is just 44 days, with only 44 % of web pages found in 1998 still available a year later,”<sup>19</sup> the task of collecting state publications cannot be put off any longer.

To collect state publications from agency web sites, a depository library requires the following:

- An acquisitions librarian familiar with the structure of state government and state government web sites, and knowledgeable about state government publications.
- An efficient way to capture a variety of formats, proprietary and open source, interactive and static.
- A means to ensure that these formats remain readable over time
- Automation to help identify new postings of publications on agency web sites.



Figure 5: Publications on a state agency's web site.

<sup>18</sup> A review of the July 2006 Depository List of publications sent to depository libraries by SLRC revealed that 83% of titles were available online.

<sup>19</sup> *White Paper on the Status of North Carolina Digital State Government Information*, located at <http://statelibrary.dcr.state.nc.us/digidocs/Workgroup/WhitePaper.pdf>, at page 21.

The staff at the Maryland State Archives conducted a comprehensive experiment in 2005-2006 to identify some of the structural and conceptual challenges in collecting digital state publications, and demonstrated that the state publishes significantly more material in digital format than in hardcopy.

## Locating Agency Web Site and Publications Pages

Finding and acquiring digital state publications requires librarians to become intimately acquainted with the web sites of Maryland's numerous state government agencies and their divisions. This is challenging because of the sheer number of digital publications and because their web addresses change for various reasons, such as: a reorganization of state government agencies, the creation of new agencies and the elimination of others, the reassignment of functions from one state agency to another, and the restructuring of units within an agency.

Actually finding publications on an agency's web site requires learning how that agency's web site is organized. The organization of an agency's web site depends upon its particular intended audience, which varies from state agency to state agency.

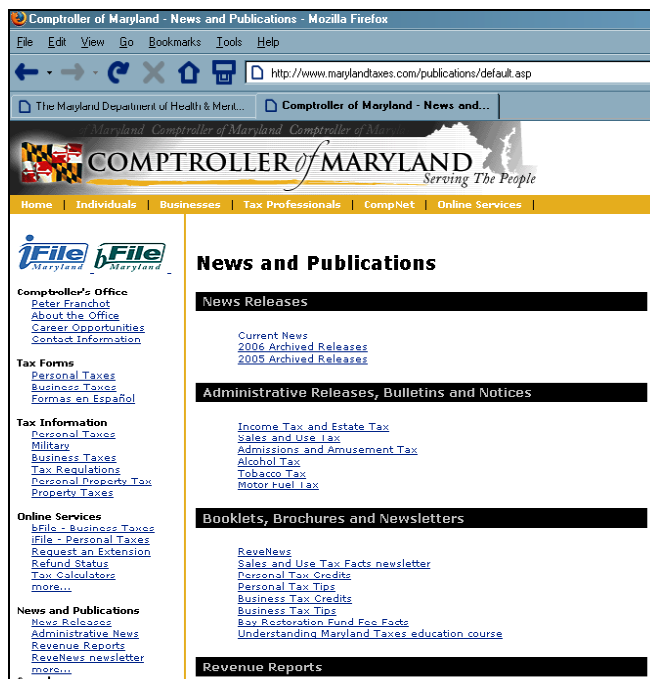


Figure 6: Another example of publications on a state government web site.

organizational structure of the agency are easier to locate than are those clustered by subject. Often the different divisions of an agency will post their own publications, so it is necessary to check each division's web page. A good example of this organizational structure is the Comptroller's web site.

Some agency web sites are organized by subject. Generally speaking, departments that directly serve the citizens of Maryland organize their material topically. A prime example of topical organization is the web site of the Department of Health and Mental Hygiene. Under this model, the publications of various units within a department are grouped by subject, not by their organizational unit. This can make it difficult to identify the publishing organization and to know whether everything published by a particular unit has been identified.

Another organizational model is by agency administrative structure. Postings that follow the

An agency may post its publications in more than one location on its web site, making an orderly review of the web site for publications difficult. A good example of this is the Maryland Department of Education web site, which has pages for students, pages for parents, and pages for teachers. Some of the same material is posted on all three sets of pages.

Some agencies have a “Publications” page; others do not. But even with a publication page, many publications are located on other parts of the site. For example, the Department of Natural Resources recently posted their annual report on their “About” page, but it was not available on their publication page. Once found, publications may lack proper descriptive information such as corporate author, title, or publication date. This, too, hinders the search for specific publications.

From time to time links on one state agency’s web site may link to other state agencies, the federal government or private organizations. These have been placed on the state agency’s web site for their related content, and may or may not be labeled clearly as someone else’s material.

### Using Technology to Locate Changes to Web Pages

Once a first pass has been made through all state agency web sites the challenge becomes identifying new postings since the last visit to the site. Some agencies use technology to keep its customers aware of new updates to its web sites. A few agencies distribute select digital publications via a subscription service. Some agencies deliver the publication as text within an e-mail. Others notify the subscriber by e-mail when an item is posted on their web site, providing a link to the publication. The Department of Legislative Services, Office of Legislative Audits uses this e-mail notification method to provide copies of its Legislative Audit reports to interested parties.

Most agencies, however, do not have a method to keep customers informed of updates, but there are tools that can help identify newly posted publications. Programs such as WatchThatPage or services like Google Alerts provide alerts to changes on web pages. All changes to the page are detected and reported, no matter how minor or insignificant. The program does not discriminate between a typo corrected since the program last visited the page and the posting of a new report.

### File Formats

The most common formats for Maryland publications include Portable Document Format (PDF), Microsoft Word files, web pages, PowerPoint presentations, spreadsheets, databases; and audio, video, and Shockwave files. A particularly thorny problem is how to capture and provide access to databases designed for the user to manipulate; for example, databases which the user queries to produce a statistical report. Additionally, issues of a serial may be published in different formats, e.g., a run of newsletters or a

year's listing of press releases, may contain some files that are in HTML, some in PDF, and some in Microsoft Word. This complicates downloading and cataloging.

Publications are not always posted in a way that is easy to download and save. For example, each section or chapter of a report may be posted as a separate file. Sometimes the parts are linked in so complex a way that it is not practical to capture the report because it is too time-consuming to do so, or because the relationship of the parts to the whole of the publication becomes too confusing to follow. What starts out feeling like a publication becomes something more like a web site.

Searching retrospectively and without the aid of automation, the Maryland State Archives has acquired some ten thousand state government publications, dating from the mid-1990's to present. While this number reflects equal weight given to individual issues of a weekly newsletter as to the final report of an Executive Task Force issued once, it still demonstrates the extent of digital publishing by state government agencies over the last several years.

In spite of the many obstacles described above, it is possible to discover, acquire, and provide permanent public access to digital state government publications. In fact, the trend to publish digitally offers libraries the opportunity to acquire more publications than could be obtained when state government publications were published exclusively on paper. Libraries no longer can depend upon agencies to inform them of what they publish. The publications are out there; it is up to the librarians to find them. But doing so requires the skills of librarians knowledgeable about state government and state government web sites, assisted by a strong collection development policy and efficient automation.

## V. Cataloging

**Key points:**

- Cataloging provides critical access points for locating publications.
- The current model of having each library catalog the state publications it receives is inefficient and ineffective because many libraries may originally catalog the same publications while other materials are not cataloged at all.
- The cooperative cataloging model, where libraries share cataloging duties and the resulting catalog records, is more efficient but previously unsuccessful.
- A centralized cataloging model, where one library catalogs all publications, is strongly recommended by the member Depository Libraries and the Digital State Publications Task Force.

### Why Catalog?

In recent years with the advent of bigger and better search engines there has been much discussion as to whether cataloging of digital publications is necessary. It is the opinion of most librarians and of this Task Force that today it is as important as it ever was, if not more so.

An uncataloged collection is analogous to a library after a tornado where everything is strewn randomly. Looking for one book then becomes a search through every book until the sought-after book is found. Cataloging organizes the books into logical groups to make the search much more manageable so that users do not have to search through unrelated materials or topics to find what they are looking for. This holds true for digital publications as well. Through bibliographic details and subject analysis a catalog record provides a brief summary of a publication. This information helps the user determine if that particular publication will be useful. It also assists the user in finding other similar items through author and subject entries.

Cataloging can provide a valuable tool to sorting publications or excluding publications by categories such as date, agency, subject, and title. In addition to aiding the user, a catalog record provides an inventory control for libraries to keep track of what they have and do not have. Without a catalog it becomes very difficult to keep track of holdings.

The rapidly increasing number of digital publications makes full text searching a daunting task even for today's powerful computers. A search that takes a long time or one



which retrieves a huge number of hits does not help a user. Organizing and adding subject headings through a catalog record does.

### Approaches to Cataloging

With so many publications to be cataloged, determining the best approach to managing their efficient and speedy cataloging can be challenging. The current practice of allowing each library to catalog or not as they see fit provides very unequal coverage across the state. Some libraries provide full cataloging of almost everything with a very quick turnaround time. Some libraries perform only partial cataloging at a slower pace. Still others do not catalog state publications or else do not include them in the main catalog with other resources. With the current approach many libraries may perform original cataloging of the same publications while other materials are not cataloged at all.

In the 1980s, Maryland recognized that such a “first come, first serve” approach to cataloging was highly inefficient because work was either duplicated or simply ignored. In the mid-1980s, the libraries participating in the depository program tried a cooperative cataloging arrangement. It was organized by Susan Blevins Davis who at the time was at the University of Baltimore. She held an organizational meeting that included academic libraries, the Maryland State Law Library, and the Maryland Department of Legislative Reference Library, but not the public libraries in the depository program. Each participating library was assigned the task of adding catalog records to OCLC for the publications produced by a specific state agency. The assignments were based on subject areas of particular interest to each library. Some of the libraries did a great job at getting the publications cataloged promptly, others did them eventually, and still others were not able to complete their assignments. This arrangement died out with the advent of new technologies and library staff.

The problems with this sort of cooperative cataloging include: What is a reasonable time frame for getting items cataloged? What level of cataloging is needed? Should it be done in MARC, Dublin Core, or another standard and must publications be fully cataloged or is minimum level cataloging sufficient? Does OCLC still need to be the shared database or can a local on-line catalog, Z39.50 sharing, or some other distribution model work? What cataloging quality control is there? Is there any oversight and if so by whom? If conflicts arise, is the cataloger’s first responsibility to his or her own library or to the cooperative? If the library loses cataloging staff, does someone else take over?

In the centralized approach, depository catalogers would be responsible for the cataloging of all publications collected based on agreed upon standards. This model was also tried in the past. For a brief time the SPDDP did employ a cataloger whose job it was to catalog state publications in OCLC. The arrangement did not last and the position was eliminated.

While this method does not answer all of the questions of the cooperative approach, it does establish the need for an entity that would be responsible for cataloging. Questions

with this centralized model include: How many catalogers are needed to do the job? Can one cataloger get the publications out in a reasonable time frame or are more needed? Also, what sort of support staff is needed? Is the person who is obtaining the publications also cataloging them or are these different functions? In what format are the publications going to be distributed to the depositories? If they are print publications are they to be sent shelf ready including some sort of binding or forwarded just “as is” with a paper or digital catalog record? If they are digital publications are they to be in a specific format?

### Conclusions

At the November 29, 2006 meeting of the Depository Libraries, most representatives indicated that they did not have the staff or resources available to catalog state publications. Only the Maryland State Archives, Maryland State Law Library, and Maryland Department of Legislative Services asserted that they are committed to cataloging all Maryland publications.

It seems clear from this meeting that a cooperative cataloging scheme among all of the Depository Libraries for all of the state issued publications will not work. One possible partial solution would be to designate a core collection of Maryland publications that must be cataloged and maintained by each library in order for them to be a depository. An advisory committee, described earlier in this report, would determine and set standards for cataloging this core collection that should optimally be available in OCLC's WorldCat. It seems likely, however, that this would cause many of the existing Depository Libraries to drop out of the program for lack of resources to catalog and maintain even a partial collection.

With increasing numbers of publications being issued in digital format the best option would be to have a central agency catalog all Maryland publications with all the libraries around the state having free access to a central repository. This would ensure that all publications are available to all Maryland citizens.

### Recommendations

1. The advisory committee should establish cataloging standards for state publications.
2. End the current practice of having each depository library perform its own original cataloging of state publications. This process is highly inefficient.
3. The SPDDP should catalog all collected state publications and place these records on OCLC and share records with Depository Libraries.

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## VI. Access and Preservation

**Key points:**

- Digital publications disappear daily from agency web sites.
- Digital publication must be collected to be preserved.
- Numerous hardware and software solutions exist to save and preserve state publications.

### Print vs. Digital

Librarians have a long history of developing systems to manage and preserve print publications. Over the past fifty years, libraries have moved from print card catalogs to complex online search and retrieval systems. Librarians and preservationists have developed new print standards so that books and the paper they are printed on will last a very long time.

Librarians are now actively looking at ways to manage digital collections. In some ways digital materials are easier to manage than their print counterparts. When print materials arrived they usually need to be barcoded, assigned a call number, labeled and placed on a bookshelf. Librarians have developed complex system to know what materials are in the library and what materials are on loan. None of these steps is needed when managing digital materials. They can be shared by anyone, anywhere in the world. When digital material are made available online, users do not need to visit the library to check out the publication. The material is available for all and can be used simultaneously by many individuals.

Digital collections do present librarians with many challenges. The primary challenge in managing digital materials is file formats and authentication. Will a PDF file created in 2005 be readable in 2025, and how can its authenticity be verified? These are issues that are not only facing libraries but also the business community. In time, standards will be developed to manage digital files to ensure their use in the decades and centuries to come.

### Access to Digital Publications

Like the variety of systems that are available to shelve books, (usually via Library of Congress Call Number or Dewey number), there a variety of ways libraries can provide access to digital publications.

## Direct Linking

The simplest way to access digital publications is to create a link directly to the publication on the agency's website. These links are easy to add to a catalog record, and because most catalogs are available to anyone with an Internet connection these materials can be easily retrieved.

Although direct linking provides access to the publication from the source of the publication, libraries have no control over the stability of these links (see Figure 7). In time publications are moved or removed from a web site and the original link no longer works leaving the library patron without access to the material he or she sought.

Texas has tried the direct link approach with the Texas Records and Information Locator, commonly known as TRAIL<sup>20</sup>. TRAIL is simply a portal or gateway to various state publications. Search results include a direct link to the publication on the state agency's web site. Despite strict rules that materials are not to be moved or deleted, many links no longer work.

The screenshot shows the Maryland State Law Library catalog interface. At the top, there are navigation buttons: START OVER, EXPORT, MARC DISPLAY, RETURN TO BROWSE, and ANOTHER SEARCH. Below these is a search bar with the text 'maryland online publications' and a 'Search' button. The main heading is 'Direct links to a state publication'. Below this, there is a record summary: Title: Enrollment by place of residence in Maryland institutions of higher education; Imprint: Annapolis, Md. (16 Francis St., Annapolis 21401) : State Board for Higher Education, 1985 -. A section titled 'Click on the following to:' contains two links: '2005 Report Available Online (PDF File)' and '2004 Report Available Online (PDF File)'. Below this is a table with columns: LOCATION, CALL #, and STATUS. The table contains two rows: MD STATE DOCUMENTS with call number HI 1. 2:EBP and status CHECK SHELVES for Fall 1984-1985; and MD STATE DOCUMENTS with call number HI 1. 2:EBP and status CHECK SHELVES for Fall 1998-2000. Below the table are fields for Subject, Descript., All author, and Series, each with a link to the corresponding information. At the bottom, there are navigation buttons: START OVER, EXPORT, MARC DISPLAY, RETURN TO BROWSE, and ANOTHER SEARCH.

Figure 7: Example of direct links to a state publication.

## Disappearing Links

Maryland is no stranger to the problems of changing or disappearing links. In the spring of 2006 the Office of Legislative Audits (OLA) reworked its web site causing the links to over 500 audit reports to change. Many libraries, including the library at Legislative Services and the Maryland State Law Library had cataloged each audit report and included a link directly to the audit report on OLA's website. Libraries were not made aware of the change so overnight access to these publication disappeared because the links in the catalog records were no longer correct. To correct the problem, libraries needed to go into the catalog record for each audit report and update the link.

<sup>20</sup> Texas Records and Information Locator (TRAIL) is located at <http://www2.tsl.state.tx.us/trail/index.jsp>

Although changing of the audit reports links caused a huge problem, at least libraries were quick to recognize the problem and update the links. Because the change was so massive, it was easy to recognize the problem. But everyday webmasters throughout the state of Maryland are updating their web sites and every day links added to the catalog become obsolete. Without a place to store state publications this insidious problem will continue to grow.

### **Shared Repositories**

Because direct linking will not work in managing digital materials, libraries have been looking at other options. OCLC, a commercial entity established as a consortium of Ohio libraries, has recognized the problem of changing and disappearing links and has established a shared repository called Digital Archive<sup>21</sup>. Digital Archive offers a potential solution to the problem of changing or disappearing links. Rather than linking the original URL of a publication, the publication is copied and stored in Digital Archive, guaranteeing its permanence. Using a tool like Digital Archive eliminates the need to also print out publications, thus saving printing and distribution costs.

OCLC Digital Archive has many advantages. Ingested publications have a permanent URL so links that are added to catalog records will always work. Librarians can add these links to existing cataloging records so no new cataloging is required. If a catalog record exists on WorldCat, the Digital Archive URL is added to the record, greatly expanding access to these materials. The software used to harvest and digest publication, Connexion, is a tool well known to librarians so the learning curve for adding publications is not steep. Finally, OCLC is committed to maintaining the integrity of the publications in the decades to come. As file formats change or disappear OCLC will be developing ways so that older formats can be read decades in the future.

Digital Archive, however, is not inexpensive. At present, yearly costs range from \$12,000 to \$14,000 per year and there are additional costs based on how much material is stored. OCLC is examining its pricing model and costs will probably decline in the next few years, but not substantially.

To insure that digital publications will continue to be available, two institutions in Maryland, the Maryland State Archives and the Legislative Services Library, now save publications to their own servers. Experience has taught both organizations that links to digital publications do disappear. Both systems are basic versions of Digital Archive. Both groups acknowledge that these systems are stopgap measures designed to save material that may disappear from an agency web site.

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<sup>21</sup> OCLC's Digital Archive web site is located at <http://digitalarchive.oclc.org>

## Dedicated Repository

What Digital Archive and the storage systems developed by the Maryland State Archives and Legislative Service's Library lack is the ability to do a full-text search. In the age of Google, there is an expectation, and not an unreasonable one, that any digital publication can be

found via a search engine. The state of Maryland provides a full text search on Maryland.gov and so does almost every state agency. But these search engines can only retrieve publications that are currently on their web sites. Once a report, publication, brochure, guideline, or directive is removed from the web site the digital memory of that publication ceases to exist and in many cases the publication is gone, forever. There are now a growing number of software/hardware solutions that can not only store publications but also exploit their innate searchability, creating a digital library. Open source solutions include Fedora,<sup>22</sup> Greenstone,<sup>23</sup> and Dspace,<sup>24</sup> among others. As open source solutions, the software is free; however, most of these systems require a talented programmer to install and program the software. The exception to this is Greenstone, which out of the box is fairly easy to implement but limited in some of its features (see Figure 8).

There are also a number of commercial-off-the-shelf (COTS) products on the market that require much less work to implement, but they can be expensive. OCLC's product, ContentDM,<sup>25</sup> is used extensively by many libraries and archives that have digitized their collections. ContentDM is designed to work extremely well with images, but in its present release does not work nearly as well for print collections. Two other COTS products are ArchivalWare from PTFS<sup>26</sup> and MetaStar by Blue Angel Technologies.<sup>27</sup> Both products are designed to work well with digital print collections.



Figure 8: The Greenstone open-source repository.

<sup>22</sup> Information on Fedora can be found at <http://www.fedora.info>

<sup>23</sup> Information on Greenstone can be found at <http://www.greenstone.org>

<sup>24</sup> Information on DSpace can be found at <http://www.dspace.org>

<sup>25</sup> Information on ContentDM can be found at <http://contentdm/default.htm>

<sup>26</sup> Information on ArchivalWare can be found at [http://www.ptfs.com/products\\_archwal.html](http://www.ptfs.com/products_archwal.html)

<sup>27</sup> Information on Blue Angel Technologies can be found at <http://www.blueangeltech.com/customers.html>



## Conclusions

An ideal solution for the state of Maryland is to use a long-term storage tool, like Digital Archive in conjunction with a digital library software repository package like Greenstone, ArchivalWare, or MetaStar. To use a book analogy, Digital Archive would preserve a hardback copy of a book while Greenstone, ArchivalWare, or MetaStar would provide public access to numerous paperback copies.

Because implementing two systems at the same time is challenging and expensive, the Task Force suggests beginning with storing digital state publications in OCLC's Digital Archive with a corresponding WorldCat catalog with a link to the publication in Digital Archive. The next step would be to build a digital library repository for state publications. Maryland must decide if it wishes to use software that is inexpensive to buy, but is expensive in time and staff to implement or employ a commercial off-the-shelf product that would require a substantial investment in software but would not require hiring programmers for system configuration.

The decision on which approach to take—open source or COTS—primarily depends on budget and staffing issues. The advisory committee should investigate which alternative is better for SLRC and the SPDDP.

## Recommendations

1. SLRC should contract with OCLC to purchase Digital Archive to provide a means to **preserve** state publications. Publications should have a corresponding bibliographic record in WorldCat with a link to the publication in Digital Archive.
2. Set up a repository that will store and provide **access** to all state of Maryland digital publications.
3. The advisory committee and SLRC should determine what type of software (Open Source or COTS) they wish to use for the state publications repository.



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## VII. Other States

Because many states are already working to collect and manage state publications, Task Force members contacted a number of states to learn about their programs. States contacted include: North Carolina, Connecticut, New Jersey, Wisconsin, Illinois, Texas, Alaska, Arizona, Michigan, New Mexico and Oregon. Library representatives from these states were extremely helpful in providing Task Force members with their expertise and advice.

### Key Findings

- It is critical to collect materials now because state publications disappear from web sites on a daily basis.
- Dedicated funding and institution support are key factors of success.
- The print depository library model that requires state agencies to send material to a central location for distribution does not work for publications that are only available online.
- Directly linking to state publications on agency web sites does not work because webmasters move and remove materials often.
- Webmasters at state agencies do not have the time or the interest to cooperate with librarians collecting publications.
- Tools to harvest publications from agency web sites are improving but human intervention will always be required to manage these publications, i.e. select relevant materials, remove duplicates, organize collections, provide metadata, etc.
- Cataloging of materials is critical and should be done just once, either in a centralized location or through a cooperative agreement that holds institutions accountable.
- OCLC Digital Archive was the tool of choice to begin collecting and storing materials.
- States wish to establish repositories of state publications with full text searching capabilities. Software tools to manage these collections are becoming standardized.
- There are a number of technological hurdles in collecting and providing long-term access to these materials. It is important to keep these in mind, but these hurdles should not preclude action.
- Cost issues are not an obstacle to action; reallocation of resources and institutional commitment is key.
- Cost savings can be found if there is no longer a requirement to print and distribute the “hard copies” of digital publications to member libraries.

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## VIII. Recommended Initial Steps

### Program Commitment

The key factor in the success of any state depository library program is *strong* program commitment. SLRC must continue to strengthen the SPDDP.

### Staffing

The Task Force believes that a program to collect, catalog and store digital publications can be operated with 4 FTE.

- 1 FTE Acquisitions Librarian to identify, collect, and store digital materials
- 2 FTE Catalogers with experience in working with cataloging government publications
- ½ FTE Programmer/IT Support
- ½ FTE for Program Administration

### Stable Funding

The program must be fully funded and fully staffed. The Task Force recommends at least 5% of the SLRC budget, or about \$500,000 for FY 2008, be dedicated to the SPDDP. This figure is an estimate, based on the approximate estimated costs of the above-mentioned staffing needs and the digital preservation hardware and software costs outlined in Section VI.<sup>28</sup>

### Form an SPDDP Advisory Committee

The committee should include membership from those libraries currently named in the SPDDP statute. These include:

- The State Library Resource Center
- The Maryland Department of Legislative Services Library
- The Maryland State Archives
- The Maryland State Law Library
- University of Maryland Libraries (College Park)
- The Library of Congress

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<sup>28</sup> Additionally, the Task Force contacted a local library staffing company and asked for a cost quote for the staffing and repository software hosting for the recommended program. Their estimated staffing cost is \$455,000. The cost for OCLC Digital Archive is around \$14,000 per year.

The Task Force also recommends the advisory committee include a member from SAILOR, any other interested Depository Libraries, and any interested representatives from the Maryland Advisory Council on Libraries (MACL).

Meetings should be held monthly for the first year. The group's chair should be a management level representative of one of the member libraries.

The advisory committee will first develop a collection development policy based on the "Hierarchy of State Publications" outlined in this report. It will then investigate and recommend to SLRC a software solution for the repository. Both of these goals should be accomplished within the first year.

### **Contract with OCLC for Digital Archive**

As an interim measure, the SLRC should investigate a contract with OCLC to purchase Digital Archive to provide a means to store and preserve state publications. Digital Archive tools are designed to complement the collecting and cataloging process. The estimated yearly cost of Digital Archive is in the range of \$14,000 per year.

As items are added to the SPDDP Digital Archive they should also include a WorldCat cataloging record. The monthly publication list that is sent to Depository Libraries should list publications added to Digital Archive and include the title, publisher, OCLC number, and Digital Archive link. This would make it easy for Depository Libraries to download the OCLC record to their catalog and add their holdings symbol. For libraries without an OCLC account, the SPDDP should include a digital copy of the cataloging record.

### **Set up a State Repository**

The ultimate goal for Maryland should be to set up a digital repository for all state publications. This repository would include the actual file, be full text searchable and include detailed metadata for publications. This can be implemented using either commercial off-the-shelf software or via open source tools.

# Appendix A

## Excerpt from Maryland Code, Title 23, Subtitle 3 Maryland Code

### EDUCATION

#### TITLE 23. LIBRARIES

#### SUBTITLE 3. STATE PUBLICATIONS AND DEPOSITORY PROGRAM

#### § 23-301. Definitions.

- (a) In general.- In this subtitle the following words have the meanings indicated.
- (b) Depository library.-
  - (1) "Depository library" means a library designated for the receipt and maintenance of State publications.
  - (2) "Depository library" includes:
    - (i) The State Library Resource Center;
    - (ii) The Maryland Department of Legislative Services Library;
    - (iii) The State Archives;
    - (iv) The Maryland State Law Library;
    - (v) The McKeldin Library of the University of Maryland;
    - (vi) The Library of Congress; and
    - (vii) Any other library designated by the Commission on State Publications Depository and Distribution Program as a depository library.
- (c) Program.- "Program" means the State Publications Depository and Distribution Program.
- (d) State agency.- "State agency" means any permanent or temporary State office, department, division or unit, bureau, board, commission, Task Force, authority, institution, State college or university, and any other unit of State government, whether executive, legislative, or judicial, and includes any subunits of State government.
- (e) State publication. -
  - (1) "State publication" means informational materials produced, regardless of format, by the authority of, or at the total or partial expense of any State agency.
  - (2) "State publication" includes a publication sponsored by a State agency, issued in conjunction with, or under contract with the federal government, local units of government, private individuals, institutions, corporations, research firms, or other entities. "State publication" does not include correspondence, interoffice and intraoffice

memoranda, routine forms or other internal records, publications of bicounty agencies which comply with this program as required in § 23-304 of this subtitle, or any informational listing which any State statute provides shall be sold to members of the public for a fee.

**§ 23-302. State Publications Depository and Distribution Program.**

- (a) Created.- There is created, as part of the State Library Resource Center at the Enoch Pratt Free Library, a State Publications Depository and Distribution Program.
- (b) Responsibilities. - This Program is responsible for:
  - (1) The collection of State publications;
  - (2) The distribution of State publications to the depository libraries;
  - (3) The monthly issuance of a list of all State publications that have been received by the Center. This list shall be sent to all depository libraries and to others upon request and the Center may provide for subscription services; and
  - (4) Making determinations on exemptions of State publications from the depository requirements of this subtitle.
- (c) Appointment of Administrator. - The Administrator of the Program shall be appointed by the Director of the State Library Resource Center.
- (d) Funding.- Funding for the Program shall be provided in the aid to education budget of the State Board of Education in a program entitled State Publications Depository.

**§ 23-303. Responsibilities of State agencies.**

- (a) Designation of publications contact person by State agencies. - Each State agency shall designate an agency publications contact person, and shall notify the Center of the designation.
- (b) State agencies to provide Center with agency publications.- Each State agency shall furnish to the Center a sufficient quantity of each publication to meet the requirements of the depository system.

**§ 23-304. Responsibilities of bicounty agencies.**

Each bicounty agency shall:

- (1) Designate an agency publications contact person, and notify the Center of the designation;
- (2) Furnish to the Center 1 copy of each publication to meet the requirements of the depository system; and
- (3) Furnish 1 copy each to a designated branch library within each county library system of the counties in which the bicounty agency operates or furnish all copies to the Center for distribution as stated in this section.

[1982, ch. 912; 1983, ch. 8; 1996, ch. 10, § 16; ch. 341, § 2.]

## Appendix B:

Maryland State Library Resource Center Strategic Plan, FY2006 to FY2008, September 2004, Page 11

### **SLRC**

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#### **Specialized Reference Services and Collections**

##### Goal 3

Customers receive specialized reference services and materials to satisfy their information needs.

##### Objective 3.1

By July 2007, review and enhance the State Publications Depository and Distribution Program (SPDDP).

##### Strategies

- SLRC Oversight Commission convenes three times a year to address issues related to improving the SPDDP.
- SLRC Oversight Commission considers outsourcing the program.
- Market the SPDDP to end-users.
- In collaboration with stakeholders, publish a plan for end-user to have electronic access to state documents.
- Consider integration with objectives under statewide databases.

##### Objective 3.2

By April 2006, review and update the policy for retrospective and current print collections, and for electronic resources.

##### Strategies

- Identify libraries with retrospective collections.
- Assist in the revision of the SLRC collection policy, a component of "How Baltimore Chooses," with input from statewide stakeholders and the SLRC Oversight Commission, approved by the Enoch Pratt Free Library Board, and reviewed regularly.
- Consider developing a separate SLRC collection development policy.
- Consider increasing the number of electronic resources to include digital collections (in-house, home-grown or commercial databases).
- Develop a plan for which retrospective collections are to be retained and which are to be weeded.



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## Appendix C: Letter from Denise Davis, *et al.*, to Irene Padilla, January 2004

The letter on the following pages as scanned from the original received by Mike Miller,

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Cecil County  Public Library

301 Newark Avenue • Elkton, Maryland 21921-5441 • (410) 996-5600 • Denise Davis, Director

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To: Irene Padilla, Assistant State Superintendent for Libraries, MSDE  
From: Denise Davis, Cecil County Public Library, Chair  
Christine Alvey, State Archives  
Linda Davis, Legislative Services  
Douglas McElrath, University of Maryland  
Mike Miller, State Law Library  
Michael Osborne, Division of Library Development and Services  
Cecilia Petro, Department of Natural Resources  
Pat Wallace, Enoch Pratt Free Library/State Library Resource Center  
Date: January 15, 2004  
Re: Publications and the State Library Resource Center



This memorandum is in response to your request for our recommendations regarding the collection and distribution of state publications at the State Library Resource Center (SLRC).

The State Publications Advisory Committee ("Committee") has met six times since July 2003. Committee members decided in their first meeting to develop a letter to be sent to the state's producers of state publications that would alert them to the Committee's work and to the need to continue to send state publications to SLRC. This letter, to be signed by the Assistant State Superintendent for Libraries, was originally intended to bridge the gap between the Committee's deliberations and when it delivered its final recommendations. As the completion of its work approached, however, the Committee's ultimate recommendations were becoming more clear. The letter was revised to reflect some of the anticipated recommendations and can now serve as the first step of the reinstated state publications collection and distribution program.

Also as part of its preliminary process, the Committee reviewed the history and purpose of the state publications collection and distribution effort, and the roles of the entities represented in collecting and providing access to state publications. Committee members discussed, analyzed, and strongly reaffirmed the value of accessible state publications to legal, historical, legislative, and public policy research, and very importantly, to the public's right to know. The value of retrospective and contemporary state publication collections to stakeholders under the SLRC distribution program was also reaffirmed by former recipients of publications not on the Committee, all but one of which indicated continued interest in receiving state publications when the program is revived.

The Committee divided its primary tasks into two parts. First, the Committee sought to determine the elements that are necessary to an effective and efficient state publication's program and that are at the same time consistent with statutory provisions. During this process, the Committee also analyzed the decline of the original publications and distribution effort so that its recommendations could address the causes of that decline.

former director of the Maryland State Law Library.

2

Secondly, the Committee considered the impact of Web produced publications on Maryland's plan for the collection and distribution of state publications.

**I. Conclusions and Recommendations regarding the resumption of the State Publications Collection and Distribution Program.**

The collection and distribution program established by statute in 1982 declined when funding that had been directed toward the program was eliminated in 1991, while simultaneously local support for the Enoch Pratt Free Library dropped precipitously, and there was a period of extensive turnover in the EPFL's leadership. Even before that time, however, the Commission of the State's Depository and Distribution Program, that is mentioned in the present § 23-301 of the Education Article and was to have provided continuing oversight for the development of the program under the original statutory provisions (repealed in 1996), ceased to function. Committee members who had served on the Commission reported that some members found it difficult to attend meetings and appointments of new members by the Governor were not always made.

1. The Committee recommends that SLRC should resume its role as the collector and distributor of state publications as soon as possible. Our State Library Resource Center is a logical site for citizens to access these materials and its MILO system is a necessary mechanism for distribution. The Committee is concerned, however, that funding to support the state publications collection and distribution program must come from other areas of the existing SLRC budget. The Committee's members frequently use many of the SLRC services and find them to be very valuable. The Committee therefore recommends caution in how funds are re-allocated.

The Committee outlined the elements of the Collection and Distribution program it sees as necessary for the integrity of the program:

- a. SLRC collects state publications including reports, studies, journals, handbooks, manuals, and paper versions of electronic Web-based state publications in sufficient quantities to enable SLRC to distribute one copy of these state publications to those depositories served under the original program that wish to continue to receive publications and to meet its own collection needs.
- b. SLRC makes the determination as to which publications will be exempted from the depository requirements, with the advice of the proposed State Publications Advisory Committee (see below).
- c. SLRC retains two copies of publications for its own collections.
- d. SLRC distributes publications to the depository libraries.
- e. SLRC issues a simple monthly checklist of publications received for the depository program and distributes the list electronically to depository libraries.
- f. Depository publications are cataloged in a manner to provide access to state publications. SLRC may perform this cataloging or outsource it to a contractor, or it may seek and lead a collaborative effort in shared

- cataloging among select depository agencies. SLRC will assess which approach is most efficient and effective and proceed accordingly.
- g. SLRC appoints a project librarian/administrator who provides day-to-day management and provides leadership to the state publications collection and distribution program.

- 2. The Committee concludes that the State Publications Collection and Distribution Program must have strong and consistent leadership from both SLRC and from the collective knowledge of other state publications professionals and stakeholders statewide in a standing committee. This important role includes planning for new challenges, proposing statutory changes as needed, and auditing compliance of state agencies. The absence of such continuous and broad-based leadership played a significant role in the decline of the state publications collection and distribution program during the 1990's. When funding and leadership at SLRC suffered, for example, the absence of the Commission referenced in the statute meant that there was no mechanism for state publications stakeholders and other leaders in the state publications field to maintain the integrity of the program and to seek ways to reinstate funding when economic conditions improved.

The Committee also concludes, however, that the Commission format, which involves gubernatorial appointment, may have proven to be impractical. Much of the work of this body involves specialized technical leadership and vision. The Committee recommends that in place of the Commission, the Assistant State Superintendent for Libraries appoint a standing committee of stakeholders. The Committee recommends that members of the standing committee should always include, but not necessarily be limited to, a representative of the State Archives, the University of Maryland, Legislative Services, SLRC, State Publication Producers, and DLDS. These entities have a special role to play in relationship to state publications in Maryland and their ongoing participation is essential. The Committee recommends that a member of the new standing committee also serve on the SLRC Oversight Committee. To assure a broader representation of stakeholders on the SLRC Oversight Committee, the Committee recommends that the state publications committee representative to the SLRC Oversight Committee be someone other than, or in addition to, the SLRC State Publications Librarian. In this way, the Oversight Committee could be made aware of issues that may arise in the program that affect other stakeholders.

**II. Conclusions and Recommendations regarding the impact of Web published publications on Maryland's plan for the collection and distribution of publications.**

Web publishing of state publications is having a profound impact on the collection and distribution of state publications. The Committee reviewed literature on this subject and discussed the difficulties depository libraries are having as they cope with this new format in Maryland and throughout the nation. The report of the New Jersey State Library is an excellent and relatively brief summary of this issue and it is attached for reference.



The Committee concludes that Web publishing is an extremely complex issue posing major technical challenges for collection, preservation, and access, and in addition creating financial implications that are likely to be very significant. Three significant topics that deserve further investigation emerged: The Committee discussed the potential for collaboration between DLDS and the State Archives in preserving electronic state publications for permanent public access. The Committee identified the OCLC Digital Archives program as an option for storing and accessing electronic state publications that is worth investigating. Grant funding may be warranted in evaluating and/or implementing appropriate alternatives.

The Committee's research makes clear, however, that at least until the major technical challenges associated with access and digital preservation are addressed, state agencies must be required to include paper copies of publications that they publish on the Web with the publications that they distribute to SLRC. This requirement is consistent with the current statutory provisions regarding state publications. The letter that the Committee provided to the Assistant State Superintendent for Libraries to be sent to all state publication producers indicates, therefore, that sixteen paper versions of Web published electronic state publications, as well as sixteen copies of paper state publications, must be sent to SLRC. The Committee urges that this requirement be enforced. The Committee recognizes, however, that some state publications, such as interactive documents, cannot be provided in paper format. Until technical issues for electronic collection and storage are addressed, these documents can not be systematically collected, distributed, and preserved.

It became clear in the Committee's discussions that the original statute, which in significant part was driven by the utility of the MILO system for the physical distribution of publications, did not anticipate the nature or the scope of the challenge that electronic publications would pose to SLRC and to all of the depositories. Our discussions indicated that in addition to many technical challenges, the advent of electronic collections may offer opportunities for new partnerships among the depositories and may require new types of cooperation among state agencies (the implementation of statewide metadata standards for Web publication, for example). The Committee concludes that the present statute does not effectively address these issues. The Committee anticipates that revisions in the present statute will be required.

The Committee recommends that until a standing state publications advisory committee is created, the Committee, with the exception of the Chair, who seeks to concentrate on public library issues in her home county, plus the new SLRC Publications Administrator when hired, continue to meet. The Committee could provide immediate leadership, for example, in planning to address the concerns raised by electronic state publications as described above, in addition to assisting with the resumption of the state publications collection and distribution program.

This concludes the recommendations of our Committee. We offer to meet with the Assistant State Superintendent in person to clarify our conclusions and recommendations and/or with the SLRC Oversight Committee. We appreciate the opportunity to address these important issues and express our continued commitment of individual and institutional resources to assure the quality and integrity of the state publications collection and distribution program.

## Appendix D: Comments from Stakeholders

A draft copy of this report was shared with key staff at each of the Maryland depository libraries as well as staff at the State Library Resource Center. Their comments on the report are included below.

```
----- Forwarded message from iowens@ubalt.edu -----  
Date: Tue, 20 Mar 2007 09:31:10 -0400  
From: Ivy Owens <iowens@ubalt.edu>  
Reply-To: Ivy Owens <iowens@ubalt.edu>  
Subject: RE: State Documents Task Force Report  
To: Joan Bourne <jbourne@prattlibrary.org>
```

Dear Joan,

Thank you. This document is a clear and concise record of the November presentation. It clearly sets out the goals and needs of a Maryland digital documents program. Each section explains in detail the requirements to set up and maintain such a program. Cheers to all the Task Force and to you for handling this knotty problem in such a masterful manner!

Sincerely,

Ivy Owens  
Langsdale Library

**[Enoch Pratt Free Library] Staff Response to Report of the Digital State Publications Task Force (presented at April 2007 LSAC Meeting)**

Background: The Task Force requested feedback in March on the draft report from member state depositories. SLRC requested additional time to address the numerous factual errors and incorrect inferences attributed to SLRC and the SPDDP. It is unfortunate that some members of the Task Force were unwilling to allow additional time beyond the target schedule for the correction of these misstatements and thus to reissue a corrected report to the full Task Force for their review and input.

I. Selected Factual Errors

Section I. Program History and Funding. The State Publications Depository and Distribution Program was discontinued only once. The Program had been funded by a separate line item in the MSDE budget, which was eliminated by the state legislature in 1991. The Enoch Pratt Free Library maintained/funded the Program with minimal staffing until 2001.

Section II. Program Leadership for a Digital Age. "...the SPDDP is the only specific program SLRC is required to undertake by law..." (See 23-201)

**Requested changes have been made to the report. —Task Force**

II. Task Force Recommendations:

- *SLRC should devote at least 5% of its budget during its next budget cycle for activities outlined in this report...* This recommendation has **no supporting documentation** to justify the allocation of approximately \$500,000 of the SLRC budget for this project. There is no comparative analysis of existing programs showing budget for staffing, software, and hardware. There is no timeline for implementation of this program.

**Requested changes have been made to the report. —Task Force**

- Other Report recommendations **go beyond what the law** (see attachment) requires of the SPDDP. For example, the Program is *not* required to catalog documents. In addition, the Report suggests collaborative collection development even though the law *reserves this responsibility* to the Program.

**This report is designed to provide recommendations. In many cases our recommendations are not required by law but are practical and beneficial policies that should be considered. —Task Force**

- The Task Force Report also did not address the **state government's responsibility** to publish and provide digital information in a consistent format, instead requiring the SPDDP to usurp the responsibilities mandated to state agencies in the law. It also fails to clarify that the Maryland State Archives is the government agency charged with keeping the records of government.

**We believe this report already addresses this issue. As stated before, the purpose of this report is to provide recommendations based on information**

**gathered from other states and our experience in working with state agencies. —Task Force**

Helen Blumberg	Ann Smith
Joan Bourne	Lynn Stonesifer
Kathy Fay	Pat Wallace
Jeff Korman	Wesley Wilson