If Rumors Were Horses

March and April have been busy! Even though it’s hard to have anything new to say these days with the Internet so pervasive, there is some big news in our industry. I hope you are keeping up with the ATG NewsChannel posts which Tom Gilson crafts so thoroughly every week. Also, Erin Gallagher from Rollins College keeps us up-to-date weekly with her Hot Topics! www.against-the-grain.com

YBP has bought Ambassador Book Services’ library customers. Your YBP representative will be in touch shortly to assist with the transition if not already. https://www.ebsco.com/promo/ambassador-book-services

Moving right along, Follett, the family-owned bookseller, has acquired Baker & Taylor. Reportedly this will boost sales by almost 40 percent and strengthen Follett’s presence in a number of markets, from public libraries to foreign countries. Terms of the sale were not disclosed. http://www.4-traders.com/BARNES-NOBLE-INC-11858/news/Barnes-Noble-Blockbuster-book-deal-Follett-buys-Baker-Taylor-22193388/

The Business of Academic Bookselling … and Buying

by Bob Nardini (Vice President, Library Services, ProQuest Books) <bob.nardini@proquest.com>

M nothing makes you feel smarter than being invited to write an encyclopedia article. So I felt awfully smart while writing the entry for “Approval Plans” in the Encyclopedia of Library and Information Science, which CRC Press brought out back in 2003. That was the second edition of a venerable work that had first come out in 1968. And then last year, when asked to revise my entry for the third edition (still forthcoming), I felt smart again.

Until I re-read what I’d written that first time. Can you retract an encyclopedia article? Probably not. Too bad for me, since some of what I’d said didn’t belong in any encyclopedia. Most of what I wrote was fine, and some of it, to tell the truth, I enjoyed reading back to myself. “An approval plan is an acquisitions method under which a library receives regular shipments of new titles,” I began, a good enough start, nothing to be ashamed of there. Maybe I should have quit while ahead. Instead, I concluded with a section called, “The Future of Approval Plans.” That’s where I ran into trouble.

Approval plans would spread to overseas libraries, I predicted. Small libraries would begin to use approval plans. Why not? Approval plans were already, for many libraries, “the centerpiece for the collection of monographs.” Didn’t happen, either prediction. Many libraries who’d had one, in fact, had trimmed or even done away with their approval plans. eBooks were not doing well at the time, but I did mention them at least. And likewise, I mentioned teaching faculty in one sentence and users more generally in another, devoted a couple of sentences to metadata, and followed that by referring in a vague way to “the immediacy of data” together with “efficiency” a little further on in another sentence.

So, I wasn’t completely off base. But how would I know that the world of academic bookselling was about to change radically, and that the new centerpiece would be usage? That eBook aggregators would arise, first to challenge book vendors and then to merge with them in part so as to be more able to compete and cooperate, simultaneously, with publishers and with one another? That so many publishers would merge as well, that some publishers would become aggregators, and that all would be challenged to attract readers, let alone become as businesslike as the businesses that served them? That academic librarians would continue on page 14
Explore the phenomenon of world's fairs from The Great Exhibition in 1851 and the proliferation of North American exhibitions, to fairs around the world and twenty-first century expos. Through official records, monographs, publicity, artwork and artifacts, this online resource brings together multiple archives for rich research opportunities in this diverse topic.

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A letter to the editor from the
MSC 98, The Citadel, Charleston, SC 29409. You can also send
Letters to the Editor to <kstrauch@comcast.net>, phone or fax 843-723-3536, or snail mail:

From Your (pasta-loving) Editor:
Website that you have an article archive going back to 2009, but we'd like to obtain
issues available and, if so, how can I obtain them? I see from the
vol. 16 through 19, and nothing for volumes 20 through 26. Our new subscription
(eulogy for a bookworm).

Articles included are by Rick Lugg
(being in the middle), Stephanie Church
(strengthening the library story), Carol Joyner Cramer (alternatives
to DDA), Alan Jarvis (next for academic publishing?), and Adam Sandler
(eulogy for a bookworm).

We have interviews with Rosann Bazirjian
and N V Sathyanarayana and David Parker
has interviewed Laura Brown of JSTOR,
while Myer Kutz had a fascinating conversa-
tion with renowned attorney Jon Baumgarten.

There are several book reviews and reports
— Collecting to the Core is about advanced
astronomy texts and thanks always to Anne
Doherty for her editing of this continuing
column. I can’t believe how amazing
Regina Gong is getting so many
great book reviews, and Tom
Gilson is no slouch either.

Don Hawkins does his usual
thorough reporting on the 2016 NFAIS
Annual Conference. Ramune Kubiulis
brings us her reporters from the 2015
Charleston Conference, and Leah Hinds
gives us a few glimpses of Charleston 2016.

Back Talk is about the speedy delivery
of books through Amazon, etc. (Is speed
the best factor when buying a book regardless of
format?) Leila Salisbury is wandering
the stacks in her From a University Press column.
(I heard this quote recently, “You can’t walk the
stacks in a virtual library — all you can search
digitally is the metadata.”) Michael Arthur
surveys the importance of efficient access and
technical services operations, Jerry
Spiller fills us in on a new scholarly journal
launched by the Museum of Science Fiction,
and Michael Grunenberg asks “when is a trade
show not a trade show?” Stacey Marien
and Alayne Mundt get technical about the chaos
of media ordering while Vicki Sipe and Lynda
Aldana care about shelf-ready workflow.

It’s time to down tools. What to have for

Letters to the Editor
Send letters to <kstrauch@comcast.net>, phone or fax 843-723-3536, or snail mail:
Against the Grain, MSC 98, The Citadel, Charleston, SC 29409. You can also send
a letter to the editor from the ATG Homepage at http://www.against-the-grain.com.

Dear Editor:

I’d like to fill in some of our gaps. We have a bound copy of vols. 13, parts of
vol. 16 through 19, and nothing for volumes 20 through 26. Our new subscription
began with vol. 27#6. The simple question I have is to ask if you have any back
issues available and, if so, how can I obtain them? I see from the ATG NewsChannel
Website that you have an article archive going back to 2009, but we’d like to obtain
physical copies to fill in at least part of our collection gap.

Thanks for any info. you can pass on. I’m really enjoying Against the Grain. It has such a breezy, fun, creative
style; it’s not like any library journal I’ve ever read before.

Do y’all know how different and special you are? It’s
like the difference between a dry, boring, lecture and
a chatty, amusing, — but oh, so very knowledgeable —
conversation.

All the best, Sheila

Sheila Dorsey (Collections Librarian, Collection Management and Digitization, South Carolina State Library)
<SDorsey@statelibrary.sc.gov> ✁

Rumors
from page 1

I don’t think that I told y’all that the
soft-spoken steel magnolia, Rosann Bazirijn
is retiring. Good news is that she is moving
to Myrtle Beach, just up the street from Charleston! Plus she
is leaving Beth Bernhardt to continue her mar-
velous work with the Charleston Conferences!
We have an inter-
view with Rosann in this
issue, p.40.

The highlight
of my March/April was completing staff eval-
uations which were supposed
to be “paperless” until we had to
print everything for the files! Go figure!

So, you will understand why I was delight-
ed to attend the 18th Fiesole Collection Development Retreat
in breathtaking Tuscany.
The weather was perfect despite dire predic-
tions to the contrary. The pasta and wine were
ohh-la-la and so was the scenery. Tuscany is
this side of paradise. The Casalini’s as always
were perfectly flawless hosts and the programs
and discussions were stimulating. Sessions
tackled “The E-Book Elephant” in Scholarly
Publishing with an emphasis on new models
and new strategies and much much more.
Slides from the meeting are now available
at the official Fiesole Retreat Repository.

Continued on page 14

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Send ideas by July 15, 2016, to any of the Conference Directors listed above. The Call for Papers form is available at http://www.charlestonlibraryconference.com/participate/call-for-papers/.

Or send ideas to: Katina Strauch, MSC 98, The Citadel, Charleston, SC 29409 • 843-723-3536 (voice) • 843-805-7918 (fax) 843-509-2848 (cell) • <kstrauch@comcast.net> • www.charlestonlibraryconference.com

@Brunning: People & Technology

At the Only Edge that Means Anything / How We Understand What We Do

by Dennis Brunning (Director, The Design School Library, Arizona State University) <dennis.brunning@gmail.com>

Annals of Organizational Advice — The Moment You Can’t Ignore: Why Big Trouble Leads to a Great Future
(NY: Public Affairs, 2014)

Right at the beginning, authors Barry Dornfeld and Mel O’Connor give us a blow-by-blow account of an operating room accident or battle — it all depends on what you know. A celebrated and senior GE surgeon is closing up a patient after a 7-hour emergency resection of a perforated colon. This is a life and death moment and it’s a day at the office most of us don’t experience. As the scrub technician does inventory, he counts fewer surgical sponges out than went in. He challenges the surgeon who proceeds with the stapling procedure — closing up. It’s everyone’s responsibility to heal the patient but it’s the scrub’s job to count instruments and everything that goes into or out of the patient. The scrub told the surgeon a sponge was missing.

The next thing anyone remembers is a sailing surgical stapler. An OR out of control.

The authors are consultants and ethnographers. And fairly courageous to step into the big trouble of a dysfunctional surgery unit at a major hospital. The situation, the environment, the players — are all high stakes, high risk, high stress, high talent and skills.

Barry Dornfeld and Mel O’Connor work for CFAR — the Center for Applied Research — a research company that started up at the Wharton School of Finance at the University of Pennsylvania. The school known more for its finance MBAs (Republican presidential candidate, Donald Trump, is a graduate), it startles to read about CFAR’s approach to organizational guidance. Dornfeld filmed a documentary on Kinnear musicians in Philadelphia. O’Connor is a folklorist. How did they wander into a hospital drama or any other corporate/organizational setting they describe in their book?

I urge readers to take a spin through it. The book is easy to read, doesn’t distract with charts, lists, bullet points that slog through this genre — the consultant self-help book. Dornfeld and O’Connor approach organizational communication and dynamics in a way that may reawaken the social scientist in many of us, long somnambulant in our Ranganathian incarnation as library “scientists.”

Dornfeld and O’Connor urge their clients to understand an unignorable moment as a cultural issue. This moment is easy to understand because you feel it. Think of it as the organizational “aha” moment of falling in or out of love. Or to realize you’ve got to go to the dentist or take the car keys from an elderly parent. You just know things are going right or wrong and whatever follows must align with this realization.

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Cold Spring Harbor Perspectives in Biology

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To their credit, the authors present blow by blow case studies of asking these questions in troubled companies. At first read, one might ask — this is too simple, too direct, too easy. But read those questions again, think of how your library isn’t changing or even inching ahead and these questions are telling and not easy. Just asking is an effort but a good effort.

Of the four, the future is tough. It’s hard to imagine the future but that is where our hearts and minds point. More easily we can say who we are and we can point out the person who signs our paycheck. Much harder — to identify leadership, what that entails and how it relates to organizational behavior.

But the future…this is where our imagination takes us and where success, failure, well-being, happiness, and unhappiness will take place. We know we need to get better, grow, prosper but we understand it in “what if” statements. But we need to understand the future that is present in our culture.

I got this book to better understand CFAR’s role in helping Arizona State University Libraries into unison as we renovate an old building and along the way bring our large and talented staff into a new model of doing “library.” The Moment is an easy guide and handbook to achieve our goal. You probably face the same challenges one way or another and, whether you use CFAR or not, you can’t lose by learning cultural basics from some talented students of human behavior.

Billy Gibbons (half of ZZ Top) at age 66 takes us several tracks up and out from the ZZ Top groove to give us Perfectamundo. Cubano “Hip Hop,” Tex-Mex infused blues rock that sounds easily that he’s channeling the best of South of Austin soul. Perfectamundo is Billy Gibbons’s edge.

The edge is the outer rim that defines what you do and separates it from what you don’t do. It’s your organization’s frontier, your border. It’s where the risks and challenges facing you sit, waiting.

Ecologists coined the term “edge effect” in the 1930s to help explain why quail, grouse, and other game birds preferred transitional agricultural landscapes. They ignored more homogenous habitats like fields and forests. The greater the diversity of habitat, the greater richness of food.

These habits got the name “ecotones” or the area or zone of transition between differing habitats. Soon after economists and other social scientists saw parallels between natural ecotones and social ones — think of the great trade routes or the rich diversity of ports of call. Here ideas gathered, exchanged, tested.

In business three types of ecotones dominate. First, there is the territory where you and your customers come together. This is where the money, the whole reason you run a business and customers seek you out.

A second territory is in time. When your company interacts with its customers. Everything comes together at the point of sale or service.

The third ecotone defines all your tangible and intangible assets. It’s what most have called core but it is also an inventory of all that goes on, is achieved, is lost doing business.

Current times challenge us and our businesses to discover or re-discover what we do and how we can continue to succeed. Libraries struggle with flat budgets, disruptive technologies, and users who don’t understand what we do, how we do it, or even why we do it.

The usual reaction is to focus on our core and believe all will fall in place if we just center ourselves in what we do best. But what if our best isn’t what the world wants or believes is best?

We need to find opportunities in what is really going on. What do our different types of users want and need, what could or should be our solutions to what they need, are there values others would seek in our assets?

Maybe we should recast our relationship with users in a way that “maps” better to the user’s ultimate objective. Increasingly we are realizing that students require a quality education at the lowest cost and in the shortest time. It’s the journey they are on and we are part of that journey.

If we continue to focus on core — delivering books and journals — in just exactly the way it’s always been done, we are ignoring what’s going on. While we argue and clamor for open access students are scanning our content and lots of other content — and putting those files on Facebook pages or dropping them into a cloud box. Students are sharing answers and lists on social media. This is edgy and edge stuff.

continued on page 14

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Column Editor: Bruce Strauch (The Citadel)

Editor’s Note: Hey, are y’all reading this? If you know of an article that should be called to Against the Grain’s attention ... send an email to <kstrauch@comcast.net>. We’re listening! — KS

PASSING OF THE GREAT ONE
by Bruce Strauch (The Citadel)


He was first knighted, then became a Peer of the Realm. Was much-married, a great Man-About-London.


DON’T YOU DARE ACCUSE NYT OF GLAMORIZING WAR
by Bruce Strauch (The Citadel)

David Shields has published War Is Beautiful (PowerHouse Books), accusing the New York Times of using photos that made the war in Afghanistan glamorous. He licensed 64 photos to make his case but did not license the thumbnails of the front page with the photos in their context.

The Times has sued for violation of copyright. Shields claims Fair Use. His case seems strong based on Graham Archives v. Dorling Kindersley Ltd., the U.S. Court of Appeals for the 2nd Circuit. Shields’ thumbnails are even tinier than Kindersley’s.

And this may set a precedent for visual Fair Use.


ALL HAIL THE SMALL PRESS
by Bruce Strauch (The Citadel)

Graphic designer David Chickey has created a nonprofit small publishing house in Santa Fe for art monographs in collaboration with the artists. As profits waned in publishing, Chickey saw corners cut and celebrities grafted onto books. Radius was his answer.

In a very close relationship with the author, he publishes around 20 titles a year most at under $60. He donates hundreds of copies to schools, libraries, and art organizations.


Future Dates for Charleston Conferences

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LETS READ ABOUT THE ROMANTICS
by Bruce Strauch (The Citadel)


THE JOY OF REFERENCE BOOKS
by Bruce Strauch (The Citadel)


OH GOODY! LET’S READ NOVELS OF DESPAIR
by Bruce Strauch (The Citadel)

Joan Didion, Play It as It Lays (1971); (2) Walker Percy, The Moviegoer (1961); (3) Malcolm Lowry, Under the Volcano (1947) (probably the most depressing novel I’ve ever read); (4) Ford Madox Ford, The Good Soldier (1915); (5) Jean Rhys, After Leaving Mr. Mackenzie (1930) (Rebecca West warned against reading it “unless one is happily married, immensely rich, and in robust health; for if one is not entirely free from misery when one opens the book one will be at the suicide point long before one closes it.”).


RAMONA AUTHOR HITS 100
by Bruce Strauch (The Citadel)

Beverly Cleary, author of the beloved children’s book character Ramona, is turning 100. She says she “doesn’t look a day over 80.”

She started out with characters Beezus Quimby, Henry Huggins et al. Then the little sister Ramona was born and “never went away.” They all live on Klickitat Street in Portland, Oregon.

Beverly is a graduate of Berkeley and was trained as a librarian.

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become much more attentive to their users than to their book collections! And that those books would, as often as not, be seen as a problem as much as an asset.

Approval plans are all about buying books on the chance they might be useful. They continue to make sense for libraries with the mission, and corresponding budget, to build research collections. Fewer and fewer libraries, however, can claim that mission, or count on that budget. Instead, the same profiles that fueled approval plans are now the engines beneath the hood for Demand-Driven Acquisition (DDA) programs, generating MARC files under subject and other parameters that can provide patron access to more books than approval plans ever did. Or, many of these same profiles have been retooled for approval plans where no books are bought until a librarian has first reviewed and authorized them online on their vendor’s interface, almost like a firm order. How many new books — and which ones, and under what conditions — will academic libraries buy without good evidence their patrons will discover and then open them? Those are the questions faced today by everyone in the business of academic books.

The issue of Against the Grain isn’t about approval plans. Approval plans, for the past thirty years or so, have simply been my own usual vantage point on the academic book business. In fact the five contributors to this issue, from their own vantage points — three librarians, a publisher, and a consultant — barely mention approval plans. Just a few years ago that wouldn’t have been the case. It’s a telling sign — as if we needed another — that the business of publishing, aggregating, selling, and buying academic books is going through tectonic change, but at electronic speed.

Among the ways I’ve been fortunate in my career is that I began it by working for about fifteen years as a book vendor colleague of Rick Lugg. Now I’m fortunate once more that Rick agreed to write for this issue, since he and his wife Ruth Fischer have been as responsible as any individuals I can think of for a healthy portion of that change. When they founded Sustainable Collection Services in 2011, their earlier experience as library workflow consultants had revealed to them that academic libraries held too many print books that rarely circulated, or didn’t circulate at all. They built their new business on that insight, and in his Against the Grain contribution, Rick first provides a recap of how the academic bookselling business has evolved since the 1980s, and then presents data on book circulation that can’t be ignored. SCS, now a part of OCLC, is an example, as Rick puts it, of “how the next generation of vendor intermediary might look like,” companies who bring analytics to bear on the books and other resources that publishers produce and that libraries buy.

But today’s libraries don’t simply “buy resources.” Librarians realize that another factor that can’t be ignored in the market is the purchasing power they have. When academic librarians speak up, publishers, vendors, and aggregators are wise to listen. Stephanie Church, of Case Western Reserve University, is a librarian with a lot to say. What she says is that assessment is “no longer a buzzword” for academic libraries. A library’s importance to a university is no longer assumed. Libraries must prove it, and usage data is one of the ways to “strengthen the story.” Stephanie also has things to say about print and eBook preferences; DDA, eBook pricing models, DRM policies, and user authentication hurdles; and other questions too. Readers will be thankful that Stephanie has chosen to speak up in this issue of Against the Grain.

What if DDA went away? While the model has become widespread among academic libraries, one major aggregator has questioned the logic behind DDA. Publishers have recently pulled back or have changed their terms. Wake Forest University’s library provides “an all-you-can-eat smorgasbord” of books through a large DDA program. WFU’s Carol Cramer conducts a “thought experiment” in this issue, to find that even with less generous pricing and terms for DDA and Short-Term Loan, “DDA remains by far the most efficient models for an institution like ours.” What would Carol do if the DDA model was in fact suppressed? To find out, just read her Against the Grain contribution.

Librarians aren’t the only ones who need to justify how their budgets are spent. Scholarly publishers, according to Routeledge’s Alan Jarvis, “have to rethink their approach to deciding whether individual book projects are worth pursuing.” In his wide-ranging Against the Grain contribution, Alan rethinks just about every aspect of academic book publishing: total output, consolidation, the long tail, pricing, publishing models, eBook business models, open access, non-library markets, discovery, DRM, analytics, and more. Read it and you will feel like you’ve taken a short course in today’s academic book publishing business.

If Mark Sandler had been a baseball player and not a librarian, right about now his number would be retired, a monument erected in the outfield, he’d be shaking hands in a home plate ceremony, and soon, would be on his way to Cooperstown. Instead, Mark is retiring as Director, Center for Library Initiatives, at the Committee on Institutional Cooperation (CIC), a position he held for some ten years, apprenticed with for twenty years working in Collections at the University of Michigan. Among Mark’s grand slams were his roles in Google’s digitization projects, in the Text Creation Partnership, in shared print, in government documents digitization. I could go on, but best to stop and simply say that anyone who has ever heard Mark speak, or read something he’s written, knows that they are in for some laughs that won’t diminish the thoughtfulness of his contribution. What Mark is thinking about in this issue of Against the Grain is the future of the book itself in academic life. On that topic, let’s just say that Mark isn’t sanguine. He says a lot more than that, as well, and all of us with our hand in that book culture as it exists today would best pay attention.

All of us in the business of academic book selling might prefer that things were different — the book unthreatened, library collections revered and not questioned, usage one of those “nice to haves,” budgets strong, approval plans soaring, eBook models settled, assessment and analytics merely words in the dictionary. Instead, whether publisher, vendor, aggregator, or librarian, we’re all challenged to examine the assumptions and practices that have sustained us in the past. If we are going to engage with our future, one place we are not going to find it, I can tell you, is in the encyclopedia.
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W
hen I first became a library book-seller in 1981, I worked for the company formerly known as Yankee Book Peddler. I recall my surprise that such a business existed: buying books from publishers and selling them on to libraries. Why didn’t the libraries just buy from the publishers? The question persists, even expanded today, as the network reshapes familiar relationships: why don’t readers just buy from publishers? Heck, why don’t readers just buy from authors? Who needs all the in-between apparatus of vendors, aggregators, libraries, or even publishers? As I hope to demonstrate, we all do.

Library booksellers were legion back then, springing up in response to the growth of academic library collections — and higher education generally — in the late 1960s and 1970s. Among Yankee’s competitors in the U.S. were Academic Book Center, Blackwell Noted, Baker & Taylor Academic, Coutts, Midwest Library Services, Ambassador, Eastern, Book House, Emery-Pratt, Ballen, and others whose names I have forgotten. Thirty years later, most are gone or have morphed beyond recognition, some consolidated, some reinvented with new layers of service and expertise.

Even then, the relationship between publishers and booksellers was uneasy. Publishers preferred to sell directly to libraries. What value could a mere “jobber” offer to justify claiming a portion of the discount offered by publishers? In the 1980s, the answer was simple: consolidated transactions and invoicing. Consolidation enabled the library to replace hundreds of publisher relationships with a handful of larger-scale vendor relationships. Libraries accepted a reduced discount in exchange for savings in staff time, a single point of customer service, and consolidated shipping and billing.

Fierce competition among library suppliers kept prices in check, but more importantly drove service improvements and innovations as vendors sought to distinguish themselves. Pre-publication and new title announcements, faster delivery. In the 1990s, vendors built electronic book ordering systems such as YBP’s GOBI and Blackwell’s Collection Manager, and integrated them with library systems. Library booksellers became experts in data mapping and export, electronic invoicing and EDI. Cataloging and provision of MARC records became a part of bookselling. Shelf-ready books — cataloged, barcoded, spine-labeled — became a common offering and expectation. Library suppliers evolved into sophisticated service organizations that supported library workflows from selection through access. Libraries benefited significantly from these developments, and print book vendors succeeded in differentiating their services from those offered by publishers, and in justifying their share of the margin. Most publishers breathed a sigh of relief, largely insulated from these requirements.

Beginning around 2000, eBooks slowly began to complicate the market. Although netLibrary initially delivered more tote bags than content, it presaged the arrival of new players — and new functions — in the space between publishers and libraries. As in the early days of print, vendors and competition profiles, ordering, fund code management, business models that supported purchase or subscription; and access models that liberated eBooks from print-oriented thinking. Demand-Driven Acquisition and Short-Term Loans captured the imagination of librarians, and a new generation of vendors got schooled in MARC records and library workflows. As with print books, consolidated eBook offerings proved attractive to librarians, with content from many publishers available through a handful of interfaces and deals.

There was one wrinkle, though: print didn’t go away just because eBooks arrived. Libraries needed both formats, with coordinated selection, acquisition, and management. The space between publishers and libraries has in fact become more crowded and complex, with both new and established providers trying to survive off the margin between the publisher’s price and the library’s price. The highly-developed services around print set equally high expectations for eBook support. Libraries need integrated p/e “approval” profiles, ordering, fund code management, cataloging, customized invoicing, and workflow support. But they also need the new competencies brought by eBook aggregators: licensing, platform development, and different types of access models, business models and publisher relationships. Ideally, they need a single point of management and customer service for print book and eBook content. This is a tall order, especially since publishers continue to develop proprietary platforms and direct business arrangements. Large entities like ProQuest and EBSCO are attempting to integrate eBook and p-book services (along with e-journals, discovery services, and library management systems) into comprehensive offerings. Plenty of other approaches still have traction, though, and the invisible hand is still at work. In some respects, the roles of intermediaries — and the attendant headaches — are bigger than ever.

Meanwhile, another type of service and another set of players have arrived on the scene: collection analytics vendors. Local print book collections have come under increasing scrutiny, as library and university administrators grapple with space, budget pressures, and competing priorities. This has created a need to gather and analyze collections data in new ways, quantifying usage and e-filing with both print and digital alternatives. This reflects both the growth of assessment in higher education and the search for shared services and costs. Pressing questions need to be answered:

How often are books being used? How many copies of the same titles are held by other libraries — regionally, statewide, countrywide, globally? Which of these are securely archived in print or digital form?

And underlying all of that, the real question: How much space should we dedicate to holding print resources locally? What could instead be brought under shared management, “above the institution?”

Answering these questions, for both print and electronic resources, calls for new tools and services. In recent years, collection analytics vendors such as OCLC’s WorldShare Collection Evaluation, Bowker’s Book Analysis System, Intota Assessment, and OCLC’s Sustainable Collection Services (SCS) have begun to address such questions. OCLC/SCS compiles data from the library’s own system, WorldCat, HathiTrust, and other sources, and enables visualization and multi-faceted queries against that data through our GreenGlass decision-support application.

The 2016 version of the SCS Monographs Index (https://www.oclc.org/sustainable-collections/resources.en.html) gives a glimpse of what can be learned. It creates a high-level statistical profile of an “average” U.S. academic library collection, drawings from the library’s own data, WorldCat, HathiTrust, and other sources. The table below shows that the average library holds just over 3,800 titles (1% of its collection) that are held by fewer than five libraries in the U.S. This is an obvious place to look closely, tread carefully, and to consider formal retention commitments. Note also that of the 70 million U.S. holdings represented by libraries in the Index, 76% (that’s 53.2 million holdings!) have circulated three or fewer times in the past fifteen years; and 43% were not checked out at all during that period. That might suggest a starting point — or inspiration — for considering some sort of shared print program. It also suggests how difficult it is to predict which titles will be used in an academic library.

continued on page 18
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SCS Monographs Index

These numbers are based on 181 U.S. academic libraries, and 70 million holdings. They include research libraries, state universities, 4-year colleges, and a handful of community colleges. Circulation statistics do not include in-house use.

<table>
<thead>
<tr>
<th>Collection measure</th>
<th>Average value</th>
<th>High value</th>
<th>Low value</th>
</tr>
</thead>
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<tr>
<td>Monographs Count</td>
<td>346,353</td>
<td>2,152,729</td>
<td>13,367</td>
</tr>
<tr>
<td>Titles held by 100+ U.S. libraries—same edition</td>
<td>76%</td>
<td>95%</td>
<td>27%</td>
</tr>
<tr>
<td>Titles held by 5 or fewer U.S. libraries—any edition</td>
<td>1%</td>
<td>13%</td>
<td>9%</td>
</tr>
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<td>Held in Hathi Trust with In Copyright status</td>
<td>41%</td>
<td>55%</td>
<td>22%</td>
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<td>11%</td>
<td>9%</td>
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<td>89%</td>
<td>99%</td>
<td>59%</td>
</tr>
</tbody>
</table>

Updated: March 2016

These are early days in aggregating this sort of data, and results should be viewed as indicative rather than definitive. But they can serve to guide us where to look more carefully. And while collective data can suggest the potential for managing print in new ways, each library’s situation is different. It can be very useful to have rich contextual data for one’s own institution to inform print management strategies; i.e., to determine which titles should be retained, shared, stored, or withdrawn.

That’s where collection analytics vendors are beginning to contribute now.

But the potential for deeper analysis is even more intriguing, and it’s clear that many other opportunities can be identified and pursued, as the data gets richer. Now that it’s clear that collection analysis can play a useful role, we’ll begin to see additional innovation. For instance:

- Can we develop and incorporate monographs citation data, as an indicator of scholarly resonance? Can we use techniques of predictive and prescriptive analytics to feed intelligence back upstream — into purchasing decisions, perhaps even into publishing decisions? Can we determine what characteristics make a monograph useful — or at least more likely to be used? Can we link collection development decisions to patterns of user demand? Can we identify the availability of eBook alternates to low-use print titles? As libraries begin to share print book collections more widely, can we learn to fine-tune discoverability, to bring relevant options into user workflows?

This begins to suggest what the next generation of vendor intermediary might look like — using analytics to support selection, discovery, management, and delivery. At its fullest implementation, such a vendor would consolidate and analyze activity for books and journals, print and electronic — highlighting the value of the library’s “facilitated collections” to its users and its funding body. These are difficult tasks. Participants will be fewer, and the span of functions wider and more complex. But as higher education faces questions about student outcomes, research productivity, and the ROI on university tuition, all academic units need to optimize and demonstrate their contributions. Libraries will need new kinds of support, including evidence-based decisions on what content to make available, and what to share, and what to retain. Life in the space between publisher and library will increasingly acquire a quantitative dimension, raising the bar and changing the game once again. But the game goes on.

Strengthening the Story: Library Influence on the Academic Book Business

by Stephanie Church (Acquisitions and Metadata Services Librarian, Case Western Reserve University) <stephanie.church@case.edu>

The academic book business has many moving parts and libraries are one of them. To hypothesize on the future, I want to examine how libraries influence the market today. Delving into what I see as a librarian might help to give context to the larger discussion.

One major trend that has emerged and will continue to gain traction in the world libraries occupy is assessment. Assessment is no longer a buzzword. More and more Assessment Librarian positions are appearing in academia. Librarians, in all areas of the organization, are encouraged to contribute to a culture of evidence-based application, where strategic objectives are defined and higher-level decisions influenced by specific, measurable outcomes. Today, libraries need to demonstrate their relevance, viability, and value. These are no longer assumed on campus. Assessment is essential for libraries to make their case.

Libraries must prove and promote their impact and their value to the greater academic community. User-driven business models are very attractive to libraries for these reasons. Considering the push for use analysis and justification of purchases, it is no wonder Demand-Driven Acquisition (DDA) and evidence-based initiatives have been so widely accepted. By design, DDA allows the library to focus purchasing on repeatedly used content or titles requested by our constituency at point of need, ensuring usage. DDA permits libraries to offer a breadth of scholarly material to faculty and students in a highly cost-effective way.

In my position at Case Western Reserve University’s Kelvin Smith Library, I conducted a usage-based analysis of our first foray into DDA. One of the most influential findings demonstrated that DDA eBooks were eight times more likely to be used than firm-ordered eBooks. Cost-per-use data showed that we were spending roughly $14 per DDA eBook but over $100 for firm-ordered eBooks. A staggering 73% of firm-ordered eBooks had zero usage. This examination continued on page 20
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Discoveries like this truly aid in strategic decisions, by facilitating the discussion that informs those decisions. This is a significant way libraries can demonstrate fiscal responsibility and build their case to administration, showing why the institution should not only continue its support, but increase investment in the library. 

Aside from widening the amount of content available to our users, the less time subject specialists spend on selecting individual titles, the more time they can spend on faculty outreach and research assistance. I expect the DDA trend to continue and grow, with libraries dedicating larger portions of their budget towards user-selected content.

Recent research is suggesting a trend in general library budget growth. However this reportedly modest increase is not necessarily translating into addition funds for materials. With flat or in some cases decreasing materials budgets, librarians have a responsibility to make conscientious collection management decisions.

Collection development policies may be another area of future growth and change. If libraries have not reviewed these policies recently, this is a perfect time to revisit what we collect and why we collect. On a macro and micro level, there are so many questions to answer. Is our library collecting for posterity? What format do we purchase and why? Do we have a preferred aggregated eBook platform? How much funding should go towards user-driven initiatives? Will these decisions affect our consortia? Do we fulfill faculty format requests if that means duplicating content? The list goes on and on, and I foresee libraries making even more of an effort to focus purchasing of monographic content in ways that align with strategic goals. Revisiting the collection policy, with the greater library community’s assistance, will only help to strengthen the story a library tells to administration.

When it comes to the format discussion, the physical book is here to stay. With studies published on exhaustive reading, the correlation between screens and reduced retention, and the often expressed tactile joys of using a physical book, it is impossible for me to see a future entirely empty of them. There is still very much a need and desire for academic book use in its physical form, particularly in the Humanities.

Even so, without question, purchasing of physical scholarly monographs has declined over the past several decades. Studies and surveys have indicated this for quite some time. Anyone using OCLC Connexion Client can see this purchasing shift in action. Institutional holdings indicate that eBook titles are on the rise and often surpassing physical book holdings, sometimes by a factor of six over the print. While consortial-level buying data may inflate these numbers (KSL does not add holdings for shared purchases), this is nonetheless an important purchasing movement that warrants more discussion.

In physical books, one of my pain points in acquisitions is obtaining out-of-print and hard-to-find material. I expect that buying physical copies of titles published decades ago will be challenging. But in this day and age, why should it be just as hard to buy a book from five years ago? I am not well versed in the expense and gamble publishers take on titles and their print runs, or the business side of what it would take, but I do hope to see more print-on-demand content available. While there is a case to be made regarding general appearance and the integrity of the physical book in its original form, what our users and researchers are truly after is content. They want to absorb that content and synthesize ideas into their own work. Libraries want to provide their users with exactly what they need. Content is a huge driver in what libraries purchase. Sometimes librarians have a say in which format is best for constituents, but not always, since monographs are not necessarily available in the preferred format.

In the past few years, publishers have experimented with eBook pricing and they continue to test the market. Successful business models have emerged that seem sustainable for both publishers and libraries. We are starting to see more of a trend with publisher platforms offering content with less restrictive or even no DRM, and with unlimited user access. Journals have offered unrestricted article downloads and other user-friendly options for years and it is refreshing to see these practices rolled into the world of eBooks. It is what our faculty and students are accustomed to and they have a reasonable expectation to want equitable access in eBooks. Some publishers even go as far as to offer capabilities and assistance with text and data mining projects. These are incredible strides in our industry. Unfortunately these instances, so far, are the exception and not the rule.

In the future, I hope to see more publishers on aggregated platforms allowing for DRM-free chapter downloads, unlimited printing, and simultaneous usage. Is this too much to ask? Maybe. But we are starting to see discussion that open access “may no longer be a pressure point on commercial publishing” on the periodical front. With continued discussion and collaboration, I am optimistic that this could have a residual effect on eBooks.

Why am I optimistic? Because successful open access initiatives are emerging. One such enterprise is Knowledge Unlatched (KU). Established by Frances Pinter and first introduced at the Charleston Conference in 2010, KU harnesses buying power on a global level. It is a way for libraries, publishers, authors, and readers to join forces for the greater good of scholarly achievement through open access. Hundreds of universities in 24 countries participated in the initial pilot, sharing the cost to make 28 frontlist titles from 13 publishers universally available. Pilot assessment findings indicated that titles were downloaded worldwide on average over 1,000 times per week. KU has a truly global impact, with library buy-in and interest growing.

Alternatives to Demand-Driven Acquisition: An Exploration of Opportunity Costs

by Carol Joyner Cramer (Head of Collection Management, Wake Forest University) <cramercj@wfu.edu>

If Demand-Driven Acquisition (DDA) dies as an option, or simply no longer meets our needs, what would we do instead? The Z. Smith Reynolds Library at Wake Forest University provides an all-you-can-eat smorgasbord for our DDA profile with EBL. We currently offer about 170,000 titles. We do not exclude books based on publication date, publisher or subject. We assert that topic areas not covered by our curriculum (e.g., agriculture) will see extremely low use anyway. Therefore, we do not want to waste time pulling those topics out of our pool. On the other hand, if the occasional agriculture book gets used, then hooray, we have served a user without resorting to ILL. However, we do systematically exclude popular and juvenile works (as those categories are defined by YBP) and books with a Short-Term Loan (STL) cost of more than $200/day. We also de-duplicate against other eBook providers in our collection. However, we de-duplicate against print only in cases where the STL cost exceeds $76/day.

We can provide such a wide-ranging buffet because we have a healthy book budget and a relatively small user base, especially in comparison to our budget. In fiscal year 2015, we spent about $129 per student on monographs in all formats (including DDA). Also, we have fortunately had budget increases that match journal inflation for several years in a row. The Z. Smith Reynolds Library serves about 6,200 students, and the total student FTE at Wake Forest is about 7,600. Since the DDA model is fundamentally a pay-per-use model, a lower number of potential users most likely equates to a lower total consumption of books.
There are other ways librarians try to influence the world of academic book buying. There was a discussion on the SERIALIST listserv recently on electronic resources and how libraries handle platforms that require an additional user login beyond IP authentication. When the choice is available, librarians are actively avoiding platforms and providers that require additional hoops for users to jump through. While additional steps may not stop serious researchers, it is a huge deterrent for undergraduates who could easily confuse the extra steps as restricted access. This is a lose-lose-lose-lose situation for the reader, author, publisher, and library.

Librarians don’t want to create adversarial relationships with publishers and vendors, but we are aware that our purchases are powerful. Our purchases speak for library user needs as well as for philosophical beliefs. We will continue to navigate the changing landscapes of technology and economics by developing successful strategies driven by measurable evidence.

Librarians are speaking up in a way that is new to the profession. We are telling our story on an administrative level by demonstrating fiscal responsibility and by a concrete, measurable commitment to the university’s goals. We share our stories with other librarians and colleagues, building upon best practices, forming partnerships, and making our story stronger. We also want to share our stories with publishers, vendors, and aggregators, explaining the “why” behind individual purchasing decisions and larger purchasing patterns. With continued discussion and collaboration and mutual listening as a first step, together we can build a future that works for everyone in the business of academic books.

Endnotes

Alternatives to DDA ...
from page 20

However, the dramatic DDA price increases and publisher embargoes seen since 2014 have led us to ponder — is there a better way? Should we spend our money differently?

I did a thought experiment to explore other ways we could spend our DDA money. I made two fundamental assumptions: (1) our overall buying power will remain unchanged, and (2) the money we are currently not spending on DDA will continue to be spent exactly as it is today — i.e., this is not an opportunity to cut the budget. Notably in our case, our statewide consortium NC LIVE subscribes to library’s Academic Complete and Public Library Complete on our behalf. Therefore, I did not explore making more investments in the subscription model. For now, I focused solely on cost-per-use and ignored other factors, e.g., user experience factors, that might make a more expensive choice more desirable.

Instead of looking strictly at actual cost-per-use, this thought experiment speculates about what might happen with hypothetical future purchases, based on actual data on user behavior with our existing collection.
I calculated a hypothetical cost-per-use for four different scenarios. My conclusions were:

1. DDA (control — actual data): 170,000 books; $10.58/use (COUNTER BRI) or $28.27/STL
2. Buy More Print: 4,434 additional books; $52.71/use
3. Package Purchase: 4,052 books; $97.31/use
4. Evidence-Based Acquisition (EBA): Close to print

**Buy More Print**

To determine an approximate cost-per-use for our existing print collection, I focused on the books purchased in fiscal year 2011. These books have had almost five full years to reach a user. The average use is 1.15 times per book, and the five-year cost-per-use came to $39.40.

To project forward the cost-per-use of buying more print, I assume that the extra books bought would have lower use because we buy the most-needed books already (e.g., we already purchase almost every book directly requested by a user). We also might assume that the additional books would have a higher per-unit cost because selectors would choose more expensive books if they had more money to spend. In fiscal year 2015, the average print book purchased by my library cost $47.49. I predicted that the average cost of buying additional print books would be $52.71 and the five-year use would drop down to 1.00 per title. (This is perhaps a trifle optimistic.) These projections, if correct, would yield a cost-per-use of $52.71 for about 4,434 print books.

**Evidence-Based Acquisition**

The basic premise underlying EBA has been outlined in these pages before.1 Once the experimental access period ends, the library buys the chosen books at list price. If the eBook price mirrors print pricing, the total number of books acquired would be substantially similar to the number acquired in print. However, books acquired under the EBA model should have a lower cost-per-use compared to print, as long as the library’s choice of publisher partners fits well with user demand. I did not calculate a projected cost-per-use for EBA, since there are so many unknown variables. Given our small user base, I have serious concerns about whether enough books from a single publisher would get used to make the EBA model a good choice. Should we ever enter negotiations to purchase an EBA plan, I hope the publishers would grant the smaller schools a lower required purchase amount to account for these concerns.

I also considered the penetration rate of various publishers (what percentage of their titles was used) vs. the absolute number of titles used. If we choose to buy a publisher package, I would target a publisher with the highest possible penetration, since we would pay for every title regardless of use. With an EBA model, however, we can accept a lower penetration as long as the total number of titles used was higher.

### Table 1

<table>
<thead>
<tr>
<th>Publisher</th>
<th>Titles in WFU DDA pool</th>
<th>Usage</th>
<th>Use rate/Penetration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major commercial publisher</td>
<td>36,952</td>
<td>3,729</td>
<td>10%</td>
</tr>
<tr>
<td>Large academic publisher</td>
<td>1,836</td>
<td>619</td>
<td>34%</td>
</tr>
</tbody>
</table>

Imagine that I wanted to commit $20,000 to either a single EBA plan or a package purchase. Table 1 is extrapolated from actual DDA statistics at my institution. If I wanted to pursue an EBA plan, I should consider work...

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**What’s Next for Academic Publishing?**

by Alan Jarvis  (Publishing Director, Taylor & Francis Books)  <alan.jarvis@tandf.co.uk>

I recently spoke to an old friend and colleague now working at a rival publisher who said that their organization had undergone more change in the last two years than it had in the previous two hundred. A sentiment that may be difficult to verify but is indicative of a rate of change most in the industry are finding challenging.

This is manifested at both a macro and a micro level. Whilst publishers puzzle over “big picture” issues such as the impact and trajectory of things like Open Access, MOOCs, the for-profit educators, and the never-ending shift in library budgets away from books towards STM journals, on a micro level they also have to rethink their approach to deciding whether individual book projects are worth pursuing.

At the Charleston Library Conference I was asked how a commercial publisher can evaluate whether a monograph will be financially viable under current highly uncertain market conditions. Historically this would just be a case of comparing costs (fairly predictable) with anticipated revenues, determined by sales which, with the aid of approval plans, would also be fairly predictable.

The basics of this equation — revenues minus costs — remain the same, but the details have become much more complex. Sales revenue might now be generated from the printed hardback book, a subsequent print on demand paperback, the eBook and from eBook rentals. It is not clear how any of these components is going to behave, or even what the split between the different parts is going to be. Perhaps the only predictable thing is that total revenue from sales in all formats is likely to be lower than what it used to be from a single hardback version. Costs associated with electronic sales ought to be lower, since you are no longer paying for printing, paper and binding or for storing and distributing physical copies. But this saving is offset by investment in platforms for selling eBooks, and can be negated entirely if the publisher has anticipated, and printed for, more hard copy sales. Many other costs have been largely unaffected by the digital revolution (for example, human inputs like copy editing or the costs of peer review). The underlying feeling, therefore, at macro and at micro level, is of sailing in uncharted waters.

What does a scholarly publisher do in the face of rapid change, with conflicting priorities, and where budgets in core library markets are flat or declining? What is next for academic publishing is some combination of developments along existing trajectories, changes which are significant in...
ing with the major commercial publisher. Their title list is so large that I would almost certainly have $20,000 worth of worthwhile purchases with use by the end of the access period. On the other hand, if I want to pursue the package model, I would be better off pursuing a deal with the academic publisher that has seen deeper use.

Once, near the end of the fiscal year, I sent our selectors a list of DDA books that had seen use, but had not yet been triggered for purchase. I did not mandate that the selectors take any particular action, but many of them who had money left in their monograph funds chose to firm-order the eBook. Others chose to firm-order the print. Can EBA work like this? As long as many patrons still express a strong preference for print, we could use temporary e-access to indicate which specific titles are needed and then purchase print. We could even make a dual-format purchase in cases of highest demand.

So in summary, even with the recent price increases, DDA remains by far the most cost-efficient model for an institution like ours. If the DDA model ceased to exist (or if further price increases undid this cost efficiency), then my institution should probably consider re-directing our DDA fund toward a combination of print and EBA instead of pursuing package purchases. Institutions with a different budget profile and especially with a larger user base would probably reach very different conclusions. I can use the information I gathered to determine at what cost-per-use threshold I should consider dropping my DDA plan in favor of an alternative. Likewise, I can now identify my second choice in case the DDA option ceases to exist.

Endnotes

also active in areas other than scholarly books (e.g., journals or textbooks) are downsizing or selling their books aimed at more specialist upper-level courses. Concerns that this might lead to the sort of oligopoly that supposedly exists in STM publishing are probably premature. There is far less concentration in HSS scholarly book publishing, with a multitude of small publishers and no single player owning more than 20% of the market. And even in the most unpromising circumstances there are still new start-ups and entrants to the market. Authors and customers will likely go on being able to choose and distinguish between HSS publishers for the foreseeable future.

**The Long Tail** — Not only will publishers publish more books, but print on demand technology and eBooks guarantee that few, if any, of these titles will now go out of print. At the same time many publishers are actively re-issuing titles that were previously out of print (at Routledge this takes the form of the **Routledge Revivals** and **Routledge Library Editions** programs). This activity is enabled by digital technology, and it persists because there is a small but demonstrable demand for these books.

**Pricing** — Not a subject publishers always choose to broach but the financial realities of the market for specialist academic content mean that it cannot be ignored. Our prices are relatively high for an HSS books publisher, but the gap between our prices and those of our competitors has shrunk, and we expect it to shrink further. Fewer units sold normally leads to higher prices. Is this a vicious circle that can be broken? It is possible that with the flexibility that digital publishing brings the answer may be “yes,” or at least a qualified “yes.” There are now multiple ways in which our customers acquire our content — in print or electronic format, outright purchase or rental, and individually or in collections. Each of these might involve a different price point. The headline price of the book is no longer the sole factor in determining how much the customer pays for it.

**Change which is Significant but Not Necessarily Fundamental**

Engage proactively with new business models — Clearly there have been some bumps in the road with Demand-Driven Acquisition (DDA) and, to an even greater extent, Short-Term Loan (STL). With hindsight one could argue that publishers sleepwalked into a situation in which STL was one of the primary ways in which libraries acquired new books. Before Routledge agreed to participate in the Kindle rental program there were extensive internal discussions about whether it would extend the market or cannibalize existing sales. There were no such discussions before we agreed to STL, and we ended up having to raise our rates because of the impact that STL was having on frontlist sales. Notwithstanding this we remain excited about the potential of STL to keep books in front of potential readers for longer periods of time. We have reduced our STL rates for backlist titles (i.e., books more than a year old), in the hope that this encourages libraries to keep titles in their portfolio for longer periods. Publishers need to accept that if they are publishing more at a time when budgets are flat, then libraries will need to pursue innovative strategies to determine what to buy and what not to buy. Flexibility around price and discounting can help influence these decisions.

**Focus on Open Access** — Open Access (OA) is clearly a very powerful way of connecting authors and readers, which remains the primary function of publishers. Along with most of our competitors we have a gold OA offering, and publish OA book content (either whole titles or chapters) most months. But there remain significant issues around available funding for OA monographs in HSS subjects. The UK government, for example, has been quick to mandate gold OA but slow to provide additional funding to facilitate this.

**Sell more to non-library markets** — Scholarly publishers operate in a “mixed economy,” selling print and eBooks to different sorts of customers (libraries, individual scholars, students, and professionals). Books which primarily sell to libraries (monographs, works of reference) account for a minority of our sales. We use digital printing to sell monographs to individuals in paperback format through our **Routledge Paperbacks Direct** program and we use differential pricing to make more specialized works available to individuals in eBook form, with lower prices on Kindle and other eBook retailers. The wider availability is welcome to authors, but the impact is finite. Moreover as the library increasingly becomes something that is accessed 24/7 via a VPN the need for an individual to possess their own copy diminishes. The library still remains the heart of the market for scholarly publishers.

**Publish eOnly** — This seems to be an appropriate approach to changing technology, but we still make 70% of our sales from print and publishing eOnly might only save about 15% of our costs. Notwithstanding this, publishing models which combine eBooks and books where the hard copies are printed on demand are becoming increasingly common.

**Pursue new publishing models** — Technological developments in digital publishing have facilitated innovation from short-form publishing (e.g., the **Palgrave Pivot** or **Routledge Focus**) to complex digital platforms hosting multi-volume reference works or databases which can contain millions of items. But the latter are not what most scholars produce most of the time, nor are they what most scholars or students read. Projects like the **Routledge Performance Archive**, which makes extensive use of video, or **Routledge Handbooks Online**, which is our first foray into chapter level metadata, are potentially most valuable to us as they allow us to build our digital capabilities, experiment with different kinds of content such as video, and develop similar products based on accurate measurement of customer usage and engagement.

**Change with Potential for Paradigm Shift**

Make your books more discoverable, so they get used more, and then use that data to drive better decisions — In the contest for library budgets, slowly circulating HSS monographs find themselves consistently outgunned by easy-to-use and instantly accessible journal articles. Books have much to learn from journals if they are to make the most of the digital transition. I would highlight four key steps:

- **Make books more discoverable, so they get used more.** Adding metadata at the chapter level is an obvious first step but publishers must also work more closely with intermediaries like eBooks vendors and make sure that the metadata is surfaced by major discovery tools.
- **Remove or reduce barriers to use such as restrictions on concurrent use, printing and copying.**
- **Enhanced discoverability also gives the publisher a much greater sense of which parts of their content are being read, cited and referenced.** This is valuable information which can be used for both marketing and editorial purposes. Find out what is getting used, and publish more of it.
- **Greater usage of metrics around citations and impact, including altmetrics.**

Our experience at Routledge of what gets used when you have metadata at the chapter level is limited but eye-opening. We have chapter level metadata for our handbooks on RHo (Routledge Handbooks Online), and we believe it is a major factor in driving use. The same title is fourteen times more likely to be used on RHo than it was on our standard eBook platform. There are also striking variations in the extent to which different chapters from the same title get read. Feedback at this level of granularity has implications for customers, authors and publishers. Historically the only real data book publishers have attended to has been about sales and costs, and they lag far behind journal publishers in their use of other metrics. However, I would anticipate that this gap will close rapidly and book publishers will increasingly focus on citations, impact, and altmetrics, as well as usage data. Clearly we need to be mindful of the limits of each of these measures, but if a publisher’s main role is to connect authors and readers, paying attention to what gets read is paramount.

**Summary**

Book publishing: will it survive and will they still be books? — My argument is that if books’ content is more discoverable to readers then books themselves have a better chance of surviving as repositories of knowledge, wisdom, argument, debate and provocation, whether in print or digital formats. If book publishers can learn from journals’ use of metadata at a more granular level, books will be better able to compete for readers’ attention as their empirical research and theoretical insights will be easier to discover and will therefore be accessed more frequently and engaged with more productively by readers. In a world where usage is becoming increasingly linked to purchase, and where there is stiff competition for...
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The American Society of Mechanical Engineers (ASME)
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rognosticating about the future of the book is somewhat akin to taping a “kick me” sign onto one’s own back; it’s an open invitation to be ridiculed and abused. Google surfaces dozens of Web (“click-bait”) and magazine articles that recount the worst/dumbest/most shortsighted predictions of all time. Some of the oft-cited examples in the telecommunications sphere include:

1876: “This ‘telephone’ has too many shortcomings to be seriously considered as a means of communication.” — William Orton, President of Western Union.

1946: “Television won’t be able to hold on to any market it captures after the first six months. People will soon get tired of staring at a plywood box every night.” — Darryl Zanuck, 20th Century Fox.

2007: “There’s no chance that the iPhone is going to get any significant market share.” — Steve Ballmer, Microsoft CEO.

A personal favorite of mine from the music industry is Decca Records’ rejection of the Beatles after the group’s 1962 audition, saying, “guitar groups are on the way out” and “The Beatles have no future in show business.”

All this to say that soothsaying about books — or anything else — should be approached with trepidation. Who wants to go down in history as having said that modern day kids wouldn’t waste two weeks of their lives reading about wizards, vampires, or dystopian death matches?

What’s Next for Academic Publishing?
from page 24

limited library funds, this will be as essential for the future of books as the Gutenberg printing press once was.

But is a disaggregated book still a book? Will the scholarly book only survive if it becomes like a journal, consumed, if at all, by the chapter? Traditional fans of the book need not be alarmed. On the surface much might remain the same, with physical books still being the preferred “long-form” format for HSS scholars to delineate complex arguments, collate and analyse empirical evidence, and develop innovative methodological and theoretical insights. But alongside this familiar territory, there is a quiet revolution happening beneath the surface in a digital sphere where much publishing activity will be guided and influenced by a forensic analysis of incredibly detailed, albeit inherently imperfect, data. ✪

To the point of the question underlying these thematic essays — “Do books have a future” — I feel on safe ground answering, “totally.” I’m told a lot of people — especially smart people — like books, enjoy reading, and have a real emotional connection to that mode of transmitting information, entertainment, or even emotive sentiments. It sounds to me like a safe bet that books will stick around, especially with supporters like Mark Zuckerberg:

“My challenge for 2015 is to read a new book every other week — with an emphasis on learning about different cultures, beliefs, histories, and technologies…. I’ve found reading books very intellectually fulfilling. Books allow you to fully explore a topic and immerse yourself in a deeper way than most media today. I’m looking forward to shifting more of my media diet towards reading books.”

That’s pretty high praise from a Millennial with better than average tech skills. Books have been front and center in world culture for the past 500 years, and it is highly likely that that “booklike objects” will continue to live amongst us — both the old, extant books and newly written/produced books — for the next 500 years. The harder call is whether we expect they’ll remain, as they have been in the past, “front and center” in our education systems and leisure pursuits. Is it reasonable to expect — to predict — that books will maintain a privileged position in an increasingly cluttered landscape of infotainment options?

Disclaimers

Before wading into the uncertain waters swirling about this question of the fate of books, it should be noted that nothing clouds the vision of a so-called “booklike object” as an emotional or fiduciary interest in a particular outcome. What do the Koch brothers think about the future of the electric car? What does the Walton family think about the prospects for the shop local movement? Be assured that the Kochs know more about energy production, and the Waltons know more about retail, than those of us writing or reading this article. Nonetheless, we should remain skeptical about the analyses of those with a vested interest in one or another vision of the future. And, for that reason, readers here should be forewarned if placing their bets on book futures based on the predictions of publishers, librarians, aggregators, book jobbers, or other “experts with benefits.”

Our second disclaimer is a more general note about how large social, cultural, or technological shifts are perceived (or not), understood (or not), and ultimately accepted (or not). The march of history is not an orderly procession from then to now; it is, instead, a circuitous, ambling, unpredictable journey with pushing and shoving among competing people, ideas, systems, and technologies. Thesis and antithesis; culture and counter-culture; action and reaction — the atoms of our created social world are smashing and crashing about in our cultural accelerator — who or what will survive and emerge victorious is anyone’s guess. Thirty years from now, Google may control the entirety of the scholarly information space — no more Elseviers, ProQuests, Pearsons, or libraries; conversely, by 2050 Google could just as likely be R.I.P. alongside AskJeeves, AltaVista, Mosaic, and Yahoo (the walking dead) in a graveyard of superseded search firms.

Back to the Books

Having acknowledged some trepidation about predicting the trajectory of books going forward, I’ll warm to the task by committing some column inches to a recapitulation of the book’s centrality over centuries past. Consider how a 17th-century genius like Isaac Newton, working, as he was in Cambridge England, might make a connection with contemporary scholars like G. W. Leibniz in Germany or Blaise Pascal in France. When Newton’s Principia Mathematica was published in 1687, there were no telegraph lines nor telephones; no trains, planes, or automobiles; no film clips nor photographs to “pin”; no radio or television; and no email, social media, or Internet to facilitate real time communications. And yet, these distant scholars became aware of each other and shared ideas through the miracle of the printed book. Since face-to-face connections among contemporary scholars were made scarce by the inconvenience — even perils — of 17th-century travel, and letter writing does not scale, it fell to the book to serve as the primary conveyance of intellectual life. Moreover, the limited options for sharing ideas among contemporaneous scholars were fewer still for sharing ideas across generations. If not for the book, how could 18th-century American intellectuals like Jefferson or Franklin contemplate the work of Locke and Hobbes who lived a century earlier and an ocean away? So, for centuries, the book stood as the primary — if not the only — reliable means for conveying intellectual ideas across time and space.

Accordingly, the book, as a very particular technology for transmitting knowledge, opinions, beliefs, etc., became the tangible manifestation of the idea of “smart.” Both authors and readers would be deemed “smart” by virtue of their connection to books. Check your Roget’s for “bookish” and you’ll find the synonyms “smart,” “brainless,” and “intelligent.” To own books, and better still to read them, has stood for centuries as a status marker by which we measure intellect and competence. Austen’s Elizabeth in Pride and Prejudice proclaimed that her attraction to Darcy began with excitement about the size and richness of his library (be that literal or figurative). There are numerous references in literature — fiction, non-fiction, advice books, etc. — about judging men (and sometimes women) by the books with which they associate. All this to say that for a very long time...
time books have been associated with high social status, respect, success and leadership.

This equivalence of “books” and “smart,” or “books” and “education” may go a long way to explaining society’s longstanding love affair with the book. It’s not necessarily the book that people crave but the esteem that its readers garner from their peers. If I were to say to a group of friends that I had just finished reading The Kite Runner, I would expect their reaction to be different than had I said that I watched 87 hours of television last week. As a pseudo-academic, I might try to sneak the former into casual conversation — this article, while opting not to reveal the latter. To this same end, we should take note of the pervasive cultural habits of accumulating and displaying books in public spaces and in our homes; or using books as a backdrop for politicians or presumed “experts” being interviewed on TV or otherwise depicted in visual media; and the value that universities place on an acquisitive library. In a simple syllogism, books convey knowledge; I have books, therefore I am knowledgeable. The question before us now, though, is whether some other channel of communication might overtake the book as the primary cultural symbol of “knowledgeable.”

The Exalted Tradition of Books

While a connection to books has for centuries conferred the presumption of intelligence on individuals, there is an inherent dichotomy that began to be flirted in the early to mid-1970s between so-called “book smarts” and “street smarts,” the latter usually thought to trump the former. This dichotomy is largely at odds with various educational philosophies built around students reading the canon of great western books, the majority of which (about 75% of Mortimer Adler’s 1990 list) were published before the 20th century (and many before the first millennium). The Great Books curriculum skews decidedly to the classics — the Greeks, the Romans, medieval religious tracts, Shakespeare, authors of the Enlightenment, etc. — reflecting the historicism of western education. This western reverence for early contributions to scholarship is typical of traditional societies that emphasize behavioral norms reinforced by “the collective memory” fixed in printed books. Tradition-based societies and institutions (the church, higher education, politics) rely upon ritual, lionizing founders and ancestors, and glorifying so-called sacred texts as three iconic pillars that bolster allegedly “timeless” values and a conservative worldview; an anachronistic worldview touted as relevant for addressing the challenges of contemporary life. There are clearly other ways to build societal systems of action — and tradition-based ideologies have faced challenges throughout history (e.g., the Enlightenment, the Industrial Revolution, the Sixties) — but there is a certain simplicity to replicating and reproducing ideas from an earlier age with the hope they might produce desired outcomes in modern times. Likewise, there is a certain simplicity or appeal to assuming that the best way to educate a younger generation is to replicate the experiences — and reading lists — of their elders. Ergo, if Adler and his forebears read Homer in their formative years, so too should the current wave of 18 year olds.

Ignoring, for now, the inherent racism, sexism, jingoism, and classism of the Great Books curriculum, my concern here is with the general lack of currency inherent in book culture. It goes without saying that time invested in reading Homer, Aristotle, Virgil, and Augustine might not be the best preparation for success in Silicon Valley (“street smarts” for the mean streets of Palo Alto). And it’s not just that I’m bothered by too much curriculum focus on the ancients; I question, as well, the “datedness” of a reading list based on this week’s New York Times non-fiction best-seller list. Books are a great technology for storing and transmitting old thoughts — those of Aristotle or those of Bill O’Reilly — but are a notably slow technology for a society with the capacity for lightning-fast communication. A “current” printed book is most likely to suffer from a two-year time-lag as it is shipped from the publisher, including the time the idea of the book is conceived, plotted, researched, analyzed, written, edited, produced, marketed, and sold. Add to that the time it takes a reader to identify, acquire, and read a so-called “contemporary” book, and we might temporarily suggest that books are no longer the best technology for shedding light on contemporary issues.

On Writers and Readers

Before delving deeper into book authorship and readership, let’s agree to limit our focus hereafter to works of non-fiction — largely trade books and educational texts. I remain optimistic about the future of pleasure reading, primarily, although not exclusively, focused upon works of fiction. While there are now many leisure alternatives to book-length reading, I have a hard time accepting that immersion in a well-crafted story won’t hold its own when weighed against other pursuits. The electronic media revolution has already taken — and will continue to take — a toll on the prevalence of pleasure reading, but there are unique joys that come from engaging over days and weeks with an exciting, complicated, heart-warming, or provocative novel.

But, pleasure reading aside, what to think about the prospects for non-fiction books that are produced with an intention to educate or edify? Readers of non-fiction are more likely to apply a pragmatic standard when deciding upon the best way to educate themselves. What is this the fastest, easiest, most convenient, most reliable, most timely way to get to needed information, be that a specific fact or a theoretical context for connecting related facts? For 500 years, give or take, the answer was likely to be, “read a book.” The book was the mainstay and gold standard for communicating facts and ideas across time and space. As such, it served society extremely well in fueling progress in all walks of life. With the advent of modern telecommunications, however, can the book — should the book — maintain its pre-eminent position as the most esteemed mode of scholarly communication and a culturally celebrated symbol of an educated person?

My thesis here is that scholarly book culture — the idea of people writing and reading books for the purpose of explaining information — will recede as a norm and value in years to come. By recede, I don’t mean be purged from the face of the earth. The scholarly monograph will not disappear, but it will become less consequential as other means of conveying knowledge gain traction. Most of you are probably saying, “duh,” hasn’t this already happened? And the answer here is likely to be “yes,” but, as was stated earlier, there are a couple of fascinating data about such things, and many bookish analysts and experts continue to aver that the book is irreplaceable as a mode of scholarly communication. Those who argue that book culture is alive and well might point to the 27% increase in U.S. independent bookstores between 2009 and 2014; a general upward trend in output to over 300,000 U.S. books in 2013 and 2.2 million worldwide; Amazon investing in bricks and mortar bookstores; and 78% of Americans responding that “libraries are effective at promoting literacy and love of reading.”

But, as with any complex cultural trend, each of these seemingly positive data points can be countered with evidence to the contrary. The Bureau of Labor Statistics reports that, on average, Americans commit 2 hours and 49 minutes of their daily leisure to watching television, as compared with 19 minutes of reading (4.2 minutes for those aged 15-19 as compared with 52 minutes of “using the computer for fun”); a 30% decline in bookstore sales between 2008 and 2014; 24% of American adults surveyed in 2013 said they had not read a book in the previous year (the typical American reporting — perhaps honestly or accurately — that they read 5 books); and only 46% of adults reported visiting their public library in the previous year.

So Many Books; So Little Time

With book output having more than doubled between 2004 and 2014, it is not surprising that more books than ever are going begging. More people than ever — including academics (broadly defined) — are writing books, and fewer people than ever — including academics (broadly defined) — are reading them. On the one hand, we could argue that an unread book is no better off than a lost one, and that an unrequited telephone call does not constitute a conversation. Communication — scholarly or otherwise — implies a connection. If we don’t have a speaker AND listener, or a writer AND reader, we’re simply left with solipsistic thought that is functionally unconsummated.

Oscar Wilde once wrote that, “[I]n old days books were written by men of letters and read by the public. Nowadays books are written by the public and read by nobody.” While that was written in 1894 when U.S. book output was less than 10,000 books per year, it is more apt than ever today. In the current environment, the biggest threat to the book is the overproduction of books. It is the “tragedy of the commons,” or the peril of starvation that is visited upon a healthy or actively reproducing herd. Sooner or later, individual sheep are put at risk by the appetites of others in an accreting herd, and ultimately the survival of the species can be imperiled by the sum of so many individual appetites. An imbalance in the scholarly ecosystem between authors and readers — i.e., producers and...
consumers — should ultimately cull the herd of books, reducing output to the capacity of the environment to absorb content.

This need to balance the supply and demand for books was as true in Wilde’s time as it is today: books and journals compete with other books and journals for the attention of readers. What’s different now, however, is that we’re not dealing with a more or less homogeneous body of content — a herd of books, of sorts — that is collectively trying to adapt to its environment. Instead, there is a flood of new and rapacious predators descending upon our academic pastures and competing for sustenance with books and journals at an undersized trough of campus attention. Scholars and students can now graze for information from a multiplicity of sources — e.g., PBS, NPR, documentaries, Ted Talks, Blogs, Twitter, YouTube, Vine, Pinterest, Wikipedia, Webinars, Facebook, Reddit — that are, in many cases, faster, cheaper, easier to access, more fun and more current than the traditional scholarly monograph. So, books are fighting for survival on two fronts: 1) an internecine competition among the glut of books themselves; and 2) a competition to maintain primacy or standing when compared with other conduits of scholarly information.

So, Therefore...

What does all this mean for authors, publishers, and librarians? Academic authors will no doubt continue writing books because available tools make research and writing easier than ever, and institutional rewards continue to incentivize publication, even when the resulting work finds no market or readers. Were it the case — and it is unlikely to be — that promotion and tenure committees were to decide that books without readers should not entitle their authors to additional benefits, these authors would still draw their base salaries and begin researching their next works. Writing a book is respected work in the academy, and not really unprofitable work, for authors to pursue, so academics will likely continue to produce books until failed writing (as in failed to attract attention) is somehow penalized.

Scholarly publishers of all stripes — commercial, university presses, commercially oriented university presses, library publishers, etc. — are more likely than authors to try to regulate industry production to decrease the risks that are attendant with oversupply (think OPEC). While cooperation to manage supply is a rational response to market imbalance, individual producers do not always act rationally, nor do they trust others to do so. Putting aside the legal questions of whether publishers should be allowed to “cooperate,” “collude,” or “conspire” to regulate or restrict the supply of published books, students of game theory would tell us how difficult it is to optimize mutual benefits for a group by each individual actor accepting a limited degree of personal sacrifice. It may be rational economic behavior, but it is unlikely to come to fruition.

While more traditional trade publishers could theoretically agree to limit the number of books they publish, they have no such oppor-

unity — in theory or reality — to control the number of books flowing through the burgeoning self-publishing sector or to influence any of a number of alternative modes of scholarly communication supported by telecommunications, time-based and social media. The book publishers will no doubt argue that their vetting process — especially when academic peer review is involved — provides a level of assurance about accuracy that provides value well beyond that offered in newer communication channels. They might also argue — without much evidence — that the slower, more immersive process of long-form reading facilitates deeper learning. On the other side of the ledger, the arguments favoring the introduction of media based communications in all corners of the academy are so numerous that we don’t have the time and space to enumerate them here… and so compelling that there should really be no need.

For academic libraries, it is also a decision time; do they double down on their longstanding association with the book — hanging more and more celebrity posters that implore youngsters to read — or do they act decisively to diversify their portfolio and support a much broader array of communication channels? Does YouTube include content that might be instructive to students in an introductory anthropology class? If so, should not the campus library be vetting the best of that video content and creating convenient links to it? Likewise, should the library be working with campus faculty to surface useful podcasts, credible blogs, photographic images, curriculum relevant twitter accounts, or other vehicles for transmitting quality scholarly content? Is there any doubt that nearly all students, and the great majority of faculty, spend the bulk of their working and leisure hours online? Libraries should be thinking about how best to interact with their constituencies in the places they frequent, and how to organize, validate and preserve the varied forms of scholarly content that can be found there. It should be clear that the value proposition for libraries has shifted from acquiring and preserving once scarcely discoverable and accessible world-class books until failed writing (as in failed to attract attention) is somehow penalized.

For these and other reasons, I believe scholars will continue to drift from a reliance on books to more accommodating modes for accessing needed content. It is undeniable that some scholars, on some occasions, need to consume an in-depth, thoroughly researched, thoughtful and edited treatment of a topic of considerable interest. That, however, seems to be the exception rather than the rule. Most students or scholars writing a term paper or article: preparing a course lecture or conference presentation; writing a blog comment, book review or email; peer-reviewing an article; etc., are likely to find what they need in a series of longer or shorter Web snippets, which does not bode well for the future of the scholarly monograph.

Endnotes

3. I’m ignoring here that the three best-selling books of all time — the Bible, the Quran, and Quotations from Chairman Mao, likely have a purpose and social impact that differs from most books — fiction or non-fiction. Society is less likely to apply the word “smart” to readers, including obsessive, repetitive readers of these works, and more likely to apply notions like “devout” or “faithful.” While not negative terms in and of themselves, it is not clear that reading the Bible on an airplane is perceived by other passengers in the same way one might react to a traveler reading War and Peace.
12. Horrigan, Ibid.
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Little Red Herrings -- The Sky Is Falling, But Not for the Reason You Think

by Mark Y. Herring (Dean of Library Services, Dacus Library, Winthrop University) <herringm@winthrop.edu>

In case you missed it, the world is about to come to an end. I’m not a scryer or a doomsayer, nor am I especially prescient. But judging from the hysteria surrounding the Apple phone/FBI case, one can only conclude that the world is coming to an end, the sky is falling, civilization as we know it is coming to an end if Apple loses its gallant fight for the little millions who bought its phones.

For those of you who may be surprised by this, here’s the short version of this story. The FBI uncovered an iPhone 5C in the case of the San Bernardino, California massacre that took place in December. The couple below, Tashfeen Malik and Syed Rizwan Farook, returned from Saudi Arabia. Farook and one, Enrique Marquez, in an on-again, off-again friendship, had planned attacks, gone shooting together, and stockpiled weapons. Farook, and Malik had clearly become radicalized as had, to some extent, Enrique.

On 2 December 2015, Malik and Farook entered the Inland Regional Center and with 65 to 75 rounds of ammunition, he and his wife, both dressed in black, shot and killed 14 people while injuring 22. An excellent summary of this horrific tragedy can be found here: http://nyti.ms/22htnAm

Lots of charges remain, and the FBI, CIA and local authorities are trying to ferret all this out. The iPhone 5C has become an entity of interest to the FBI, its thinking being that the phone quite possibly holds key information on the couple’s associates, plans, and the extended machinations of these dreadful people and their deadly, dreadful acts. The FBI wants the phone unlocked, but Apple doesn’t want to comply because that would end their promise of privacy and security. What we know for certain is that 14 people are dead through no fault of their own, and 22 people injured, again for no other reason than working there, at that place, at that time.

Cue the hysteria, and the absolutists.

All sorts of enmities have weighed in on this, and nearly all of them on the side of Apple. Steve Wozniak (or Woz, as those in the know like to refer to him), quondam co-founder of Apple, sides with Apple, no less, on what he calls the “lamest” (http://for.tn/22htEU0) case ever that the FBI could have come up with. On Conan O’Brien in early March, he pontificated his views on the San Bernardino case, making the usual claims for privacy and the sky-is-falling if we open this phone, or any other phones, to the FBI. It’s always all-or-nothing for absolutists. If we do this now, it will be so for all eternity, and nothing will ever be the same.

Library notable, Barbara Fister weighed in on her Inside Higher Ed column “Babel Fish” called “Apple versus the FBI” (http://bit.ly/1QoObFy). She’s “queasy” about “the state” making a company write code that will undermine its own operating system. The ever winsome and sort-of-on-the-lam Edward Snowden eloquently called the FBI case “horsesh*t” (http://bit.ly/1SPYXzr). NSA contractor, Mr. Edward Snowden, is known only for leaking documents that he thought were important for the world to know, documents that the world immediately forgot. I should add that he did preface his comment by saying “Respectfully,” presumably allowing him to say whatever he wished in as crude a manner as he thought useful. Add to these, almost all of Silicon Valley, Hollywood celebrities, Google officials, Facebook and Twitter CEOs, and on and on.

Not many have come forward in support of the FBI. Tracy Milano, also of Inside Higher Education, came out in favor of the FBI in her column on the matter, “Understanding Tim Cook” (http://bit.ly/1V9yZY4). Her post is really more about Cook’s ill-advised post that turned the case into an us-vs-them affair. She would have advised against that part, anyway. But she takes a much bolder, and I think, eminently wiser approach most recently (http://bit.ly/1PaaSj9). Milano does the best job I’ve seen of disambiguating the absolutist passion from government totalitarianism. And Bill Gates also came out in favor of unlocking the phone (http://bit.ly/1oEjmlr) and then he backtracked a little or a lot (http://scrn.ch/1mV39Q0) depending on whom you read.

What is disturbing about those who favor Apple, and what is disturbing about Apple’s refusal, is that both parties make this case about the Holy Grail of privacy and security, in the face of 14 really dead people and 22 very injured ones. In fact, these dead or injured folks never really come up in the discussion. Apple proponents argue for precept over people, and that’s really the beginning of the end for all of us, as Nicholas Berdyaev had it.

A privacy/security argument in our digital age is a bit laughable anyway. Everything and almost everyone has been hacked already, and Internet security looks like Swiss cheese. The old saw about us not having any privacy and getting over it is now one of the sad but true facts of our brave, new digital lives. Handwringing over the potential loss of privacy for a company like Apple, a company that is stockpiling so much raw big data about all its users until the day it can figure out how to monetize that data without infuriating everyone, is ludicrous in the extreme.

We are awash in hacking and privacy breaches, but by God we’re going to stop the FBI. These arguments have an almost boogeyman quality about them, as if the government is the only entity that we really must be worried about. And it isn’t just phones. It’s everything digital: privately owned drones, smart televisions, smart refrigerators, smart cars, smart houses, eBooks, and so on. Does anyone really believe those who make these products really aren’t keeping an eye on who’s using them and why? Don’t get me wrong. We have to keep any eye on government, Juvenal’s quis custodiet ippos custodies, or who’s watching the watchers, and all that. But this paranoia about government alone is, well, crazy.

Sure, we have a lot of leftover sexagenarian Woodstockers who now teach on college campuses all across America. They’re itching for another revolution, but I don’t know why. So Apple will have new background music for its next iPhone iteration? To do so at the expense of innocent people who did nothing more than go to work strikes me as a bit much.

I know many of my library colleagues will be scandalized (but unsurprised) that I’m making a case for the FBI. Of course, Apple should unlock that phone and any other phone that may well save lives, or bring to justice those who have taken them. Some years ago, we had a patron in our building who was surfing our open Internet. He behaved

continued on page 31

<http://www.against-the-grain.com>
very suspiciously, clicking windows closed every time someone came near, stealing sly glances at him. After he left, I checked the history on his computer. Not only had he been surfing child porn, but he had also filled out an application for a middle school not two miles from us. Did I wonder at all about his privacy or hesitate while I read the Library Bill of Rights? Not even a second. Both the campus and local police were called.

Some will argue that my case and the Facebook case are two different things. But both perpetrators broke federal and state laws, and both had some expectation of privacy. My view is that if you break laws, you revoke your rights because you choose to steal the rights of others, and especially when you steal the ultimate right to life, to say nothing of liberty and justice. The state should bring to bear upon you its power in pursuit of justice. No, you can’t beat confessioms out of those whom you suspect. But you should be able to have at your disposal at least as much power as criminals have at theirs. If they use a phone to plan and/or commit murders, the state should have the right to examine said phone to bring about justice and perhaps prevent or deter others from using that shield again. Yes, we must watch the watchers, but lex est tutissima casis, after all: there is no better shield than law.

If we make any of our Bill of Rights absolute, we run the risk of making them useless for justice, let alone this Republic. One would think that after so many years of trying to make the First Amendment absolute, we’d have learned a lesson. First Amendment absolutists have made possible the Internet pornography that we are currently awash in, among other things.

And now it would appear that the absolutists are going to try to win another argument for the right of Apple to make phones and keep them locked away from government. Meanwhile, Apple will continue to collect big data and protect evildoers from the prying hands of a government that seeks to wrangle them to justice. It’s a brave, new and now very dangerous world, made all the more dangerous because absolutists view privacy and security as a precedent over people.

If successful, this is the way the world ends because this center really cannot hold.

Column Editor’s Update: Just as we were preparing this issue for publishing, the FBI successfully unlocked the phone without Apple’s assistance. While this particular issue is now resolved, the larger one discussed here still remains. — MH
any other branch of theoretical physics....” Binney and Tremaine help undergraduates comprehend what is currently under investigation by researchers and, perhaps in understanding the questions researchers are pursuing, the enterprising undergraduate may discover a topic for graduate school admission essays.

The Physics of Astrophysics by Frank Shu consists of a two-volume set (Volume 1: Radiation; Volume 2: Gas Dynamics) and encompasses nearly all of the physics and mathematics training graduate students need to pursue research in astrophysics. These volumes, while likely formidable for undergraduates, may serve as motivation to continue study in astronomy and astrophysics. One of the authors of this monograph states, “The goal of the text is to bring together topics previously found only in the subject literature so as to guide beginning researchers. Since the authors admit that the text was largely drawn from graduate-level lecture materials, this monograph may be quite challenging for undergraduates. Even if the mathematics is just slightly out of reach for even ambitious undergraduates, the authors’ appreciation for their chosen material is evident. For too often, science is depicted as dry and boring, which ignores the creativity needed to excel as a scientist. Readers may be pleasantly surprised to find selections from Shakespeare at the beginning of each chapter. These literary headings may spark inspiration in an aspiring undergraduate student.”

When Frank Shu set out to write an introductory astronomy textbook, there were countless other books on the subject. Why, then, was he compelled to add another volume to an already expansive collection? Most textbooks, he argues, tend to focus on select picturesque objects in the universe and sacrifice mathematically rigorous explanations of those objects. Instead, The Physical Universe offers the undergraduate student a solid understanding of how astronomy connects to the physical world around us. Shu notes that the book “emphasize[s] the deep connections between the macroscopic world of elementary particles, atoms, and molecules, and the macroscopic world of humans, stars, galaxies, and the universe.” Indeed the book’s organization reflects this, starting with chapters that offer a foundation for the advanced astronomical concepts that are explained later in the text. The book begins with these “basic principles,” including a historical perspective and necessary concepts from mechanics and physics. Next, the text examines stars, galaxies, cosmology, the solar system, and planetary science. The volume concludes with several chapters about life on Earth, connecting astronomy with related areas of scientific inquiry including molecular biology and even anthropology, as well as the search for life elsewhere in the universe. While the text includes sample problems that are intended for the science major, Shu points out that non-science majors will find value even without working through the questions.

Ultimately, Shu’s text engages all students — irrespective of their ultimate career path — and fosters an understanding of why scientists are motivated to pursue research careers, making it an essential title for undergraduates considering graduate study.

As more college students participate in research, undergraduate library collections should expand to include works to support them. Introductory graduate-level texts can position advanced undergraduates for the rigor of postgraduate study in a scientific field, whether they are considering applying to graduate school or perhaps enrolling in graduate-level courses during their senior year of college. All of the referenced textbooks here would be valuable additions to an undergraduate collection supporting a range of students, including those considering research careers in the astronomical sciences.

Endnotes

*Editor’s note: An asterisk (*) denotes a title selected for Resources for College Libraries.
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Column Editor’s Note: We’ve survived another winter season (thankfully a mild one for us in MI this year) and I’m sure we’re now enjoying the warm-up that spring time brings. We’re also probably busier as the semester comes to an end with the frenzy of final exams and the anticipation of our students graduating during graduation ceremonies. I’m particularly excited to see our students graduate in May knowing that the Library has played an important role in their journey as college students.

Anyway, for this issue, we have an array of new books that deal with data such as Managing Scientific and Research Data, and the Accidental Data Scientist: Big Data Applications and Opportunities for Librarians and Information Professionals. Digital humanities and data curation is an area that libraries are now actively involved in and the book Digital Curation in the Digital Humanities: Preserving and Promoting Archival and Special Collections digs deeper into that with particular emphasis on preserving special collections. If you want to know more about competitive intelligence and how it can harness our work as information professionals, then take a look at Competitive Intelligence for Information Professionals. Academic libraries and especially those in administration (like directors and deans) are always struggling with staffing issues and so this book on Strategic Human Resource Planning for Academic Libraries: Information, Technology and Organization makes the case for strategic approach to human resources development and capacity building. Finally, read more on how to create marketing plans as well as strategies for marketing libraries in this age of social media in Marketing the 21st Century Library: The Time is Now.

I have lots of books for you to review so if you want to be part of the ATG roster of reviewers, just send me an email at <gongr1@lcc.edu>. Happy reading! — RG


Reviewed by Corey Seeman (Director, Krege Library Services, Ross School of Business, University of Michigan, Ann Arbor) <cseeman@umich.edu>

There are many challenges facing library directors and administrators these days. This is especially true among academic library directors who are feeling the pinch on a number of fronts. Between the changing needs of researchers, the growing scarcity of usable space on campus, flat budgets and the eternal question of where to house a legacy print collection, there are sufficient worries to keep directors from sleeping well at night. However, behind each of these problems lies a more difficult and delicate challenge for the library director. How can the library’s workforce adapt to the changing needs of the communities we serve in a strategic and empathetic way?

Michael Crumpton, Assistant Dean for Administrative Services at the University of North Carolina at Greensboro (UNCG), writes a well-researched guide to help library directors better understand the important implications of their human resources decisions. Crumpton is a prolific author and presenter on various topics addressing the administrative needs of the library (see https://libres.uncg.edu/ir/uncg/clist.aspx?id=1946).

In his introduction, Crumpton references a “barrel of fun” that one might find at a fair or amusement park. You walk through a large rotating barrel as you move from one part of the amusement park to another. The goal is to stay upright, though many do not make it through without a tumble. That is one way to look at the work associated with strategic human resources in an academic library — trying to stay upright when the world is literally moving under your feet. The other way to look at it might be more literal — that managing library change is difficult, but human resources implications are the “barrel of fun” that directors cannot avoid.

Crumpton writes a good primer on the issue of human resource issues and practices for academic library directors and administrators. This short work is well documented and provides excellent charts and tables to help anyone finding themselves in an administrative capacity at an academic library. The approach that Crumpton takes in exploring the world of strategic human resources management is one that any business school staffer (such as myself) could appreciate and applaud. While he cites a great number of articles and studies that focus on human resources as it relates to libraries, there are many reports and resources that are drawn from higher education and human resource management fields. This gives the work a well-grounded approach to the specific issues that library directors are facing.

If I had a wish, it would be that he provided more practical examples of the shifting nature of library work. While he addresses new job skills and titles found in academic libraries, one of the bigger issues we are facing through this change is how we move staff currently filling traditional positions into the new jobs that libraries need. Making these changes during position vacancies is far easier than moving staff and libraries at the point of need. Another wish would be to learn more about the changes at UNCG over the last few years as academic libraries shift focus to the information needs of current researchers. This would give a practical layer to this work that might provide good options and suggestions for library directors at similar institutions.

Overall, this is an excellent work that provides readers with a solid framework for creating a strategic approach to a library’s most important resources, its librarians and staff.


Reviewed by Ashley Fast Bailey (Senior Collection Development Manager, YBP Library Services) <abaily@ybp.com>

Knowing where to start with a marketing plan can be overwhelming. There is so much information available and so many places that information is housed. Marketing the 21st Century Library by Debra Lucas-Alfieri takes a big picture look at various aspects of marketing for today’s library. She uses her experience of marketing libraries and provides a clear, concise guide that is a great place to start when gathering basic information on what library marketing is, where one should start, and steps involved in implementing successful marketing strategies for the 21st century library.

Lucas-Alfieri breaks her book into seven easy to navigate sections: history of library marketing, the market plan, how to use various marketing tools and techniques, managing the marketing plan, partnerships to promote the library, how to market and promote the library, and the challenge and opportunities that libraries today face. By taking time to break out and write in simple terms each of these areas of marketing, libraries can gain a clear overview of marketing in today’s landscape and how to use practical applications in their library. In addition, Lucas-Alfieri also provides case studies throughout the text to illustrate these practical applications and how-to’s.

After giving a brief history of library marketing, Lucas-Alfieri gets into the details about a library marketing plan in regards to research and continued on page 35
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assessment. By outlining several types of research and data gathering to start a marketing plan, she lays the framework for the coming sections of this book. Emphasis is placed on defining the library’s mission and vision before marketing takes place, and Lucas-Alfieri stresses the importance of not skipping this in the process. A library must know its patrons and community including their vision and mission before marketing takes place. She goes on to provide assessment tools and ideas to use before jumping into the marketing plan.

After a library defines its mission statement, the next step is to lay the groundwork for the marketing plan through assessment and research. Only then can one move on to writing and implementing the plan. The subsequent chapter outlines ways to accomplish this. Though it does not provide examples of actual marketing plans, it does a great job of defining types of plans, steps to begin thinking about creating and implementing a plan, and follow through. Lucas-Alfieri provides numerous case studies and questions after each chapter to help reinforce the various aspects of the library marketing plan.

Lastly, she goes into ways to promote the library through partnerships and various forms of media. Lucas-Alfieri brings up innovative ways to partner with the library community, mainly focusing on academic libraries, to move the marketing plan forward. Through promotion and visibility, the library can really market itself as a relevant part of the campus ecosystem.

Marketing the 21st Century Library is a great resource for someone who is starting to think about creating a marketing plan for their library, or wanting to gain a general overview of how marketing plays a role in the current state of libraries. Through case studies, well-written and clear chapters on concepts from what is a marketing plan to how to assess and manage a marketing plan, Lucas-Alfieri has written a well-rounded overview of marketing the library in the 21st century.


Reviewed by Emma Oxford (Science Librarian, Olin Library, Rollins College) <eoxford@Rollins.edu>

Managing Scientific Information and Research Data by Svetla Baykoucheva presents a broad overview of STEM (Science, Technology, Engineering, Mathematics) publishing — from professional ethics to lists of helpful resources to differences in common practices and everything in between. The subject matter is more far-reaching than its title would suggest and well-worth reading for librarians who find themselves serving scientific researchers. As a chemist turned information professional with an extensive publication record spanning numerous journals, Baykoucheva is well-placed to provide guidance on this subject. She is currently the head of the White Memorial Chemistry Library at the University of Maryland, College Park. This is her first book.

Every chapter of Managing Scientific Information contains some insight or list of resources that librarians will find useful. Some of the most interesting chapters are transcripts of interviews that Baykoucheva conducted with various scientists and information professionals, including Eugene Garfield, the founder of the Science Citation Index, which would later become Web of Science. These interviews add valuable additional perspectives on research and publishing that many librarians might not have considered. Baykoucheva has conducted numerous interviews with professionals in the field in recent years, all of them available at http://www.ascininf.org/content/interviews (including those featured in the book).

Librarians will also find useful the lists of relevant Websites and organizations that appear in several chapters. For example, there are lists of publishers involved in “new models of scientific communication” (in Chapter 2), organizations concerned with ethical research and publishing practices (in Chapter 3), and online data repositories (in Chapter 8), among others. Chapter 5 includes a comparison of several different prominent databases of scientific literature and data. The author’s evaluation of how to decide the best database for a given subject is astute. She also cites several additional studies for readers interested in further exploring the subject. In fact, every chapter includes an extensive bibliography of scholarly works for additional reading.

The book’s great strength is its discussion of aspects of scientific publishing that researchers and authors probably understand on an instictual level but that librarians may not be aware of. For example, why have preprint archives been so successful in physics and gained no ground in chemistry? How might Mendely’s tracking of all users’ research habits make some researchers uncomfortable using this citation management system? What are some of the nuances surrounding peer review in scientific disciplines? Baykoucheva also provides some commentary on the use (and misuse) of impact factors in judging scientific work, and authors and librarians alike will appreciate her analysis on these issues. Even Garfield, the creator of the journal impact factor, touches on its misuse in his transcribed interview.

If there’s one flaw in this book, it is that it covers too many aspects of scientific publishing. Indeed, the book’s title is somewhat misleading, since it suggests that it is about a much narrower aspect of the publishing endeavor than it actually is. Not until Chapter 8 (“Coping with Big Data: eScience”) does it get at what the title implies the whole book is about. But for the most part, this is a failure of the title, not the text. Only once or twice does it seem like Baykoucheva includes more information than is relevant in a given chapter.

Overall, librarians and others are likely to gain valuable insight from Baykoucheva’s perspective as a scientist turned information professional, and this book is well worth a read.

Hakansson, Charlotte, and Margareta Nelke. Competitive Intelligence for Information Professionals. Amsterdam: Chandos Publishing, 2015. 9780081002063. 152 pages. $78.95

Reviewed by Christal Ferrance (Instructional Design Librarian, George Mason University) <cferrance@gmu.edu>

Competitive Intelligence for Information Professionals is a quick read with a lot of substance. The authors are two senior information professionals from the competitive intelligence (CI) field. Hakansson is an information specialist managing business intelligence projects in several fields (pharmaceutical, medical, and business). In 2011 she founded a consulting company, Novolentia, which offers competitive intelligence and information management assistance to businesses, organizations, and public areas. Today Hakansson manages her company and also is a Team Leader Research Support for the Swedish University’s Agricultural Sciences Library. As co-author, Nelke began her career in public and academic libraries but quickly moved into the corporate world as a library manager. Since 2004 she has been an independent consultant for her firm, I.C. at Once, which offers coaching, training, and investigations in CI, information management, and business development.

The book has 12 chapters, with each focusing on different aspects of competitive intelligence and the information professional, in order to provide a comprehensive overview of the process. Chapter 1 defines competitive intelligence and its value or importance to organizations, businesses, and individuals. The authors highlight the common reasons for competitive intelligence, for example, globalization, individualization, competition, threats, IT development, and crises. However, they add an added complexity (in order to make things better, new skills and tools are needed), demand for knowledge (the best information is needed, not random, unfiltered information), and common view (the whole organization working towards common goals and vision and the breaking down of silos) to their list of important reasons. Chapters 3–6 explain the PCMAC model (plan & prioritize, capture, manage, analyze, and communicate). Often the analysis phase is regarded as the most important, yet the authors claim that the plan & prioritize phase is actually the most important because it is where “the essential questions are asked” (p.25). Particularly illuminating are tables 9.1 and 10.1.

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to tie together the conceptual, theoretical, and practical perspectives of curation within the larger digital humanities framework.

The book provides several useful and even some unique features. A key feature is how the author illustrates the theory by discussing practical applications. The real-life examples demonstrate the larger theoretical concepts of the digital humanities. The list of references is also a valuable survey of the current literature and online tools. Sabharwal also provides an in-depth study of the role of social media in the world of social curation. He reviews several online resources, like YouTube, Instagram, and Storify, and explains how they can be used as digital humanities tools. Overall this book is recommended for those who want to better understand how current practices can be used to improve the curation of special collections and archives for both teaching and research needs.


Reviewed by Michelle Polchow (Electronic Resources Librarian, George Mason University) <mpolchow@gmu.edu>

Disruptive technology continually seeps into the jobs of librarians and information professionals. “Big data” seemingly appears overnight, accelerates from newspaper buzzword into newly designed academic degree and now frequently appears within high demand job requirements. **Amy Affelt**, writing from her position as a corporate librarian, takes the data-naive on a compelling read, concisely introducing new concepts and skill building tools required to navigate this data-driven world. A key theme throughout this book is that the necessary abilities to work with data are the very ones inherent to the professional principles of research and information science management. The author constructs parallels from familiar concepts such as data verification, data integrity, and critical analysis of sources, then maps these themes to demonstrate how to produce expert research services using the clout of “big data.”

**The Accidental Data Scientist** is a useful primer, beginning with vocabulary, introduction to processes and overview of data use, and management techniques. **Affelt**, a reference librarian herself, delivers an invaluable resource list for keeping-up-to-date, sharing her curated websites, blogs, Twitter feeds, and more, that in turn can immediately benefit research customers and reinforce ongoing professional learning. So as not to overwhelm readers, it focuses on best practices that leads to high value deliverables, such as customized intelligence (that machine algorithms have yet to replicate), and qualifies why librarians and information specialists should partner as key players in developing “big data” projects. The case studies illustrate new and emerging job challenges within the fields of healthcare, transportation, entertainment, legal, law enforcement, atmospheric science, labor, education and politics. Overall, a lot of information is covered in a very effective and easy to read manner.

When reading a guidebook, the rhetoric is often inconspicuous, but this book presents an interesting dichotomy. Starting on page one, the author states that the profession of librarianship seems under attack with industry behavior labeled as “coming too late ...to respond to game changers,” “missed opportunities,” and a vocation which has “fallen prey.” But in between the reprove, **Affelt** attempts to counterbalance, acknowledging that any concept using the word “big” can bring about intimidation, then rallies with a pep talk for overcoming fear. So on one hand, the tone is critical towards the profession, but then endeavors to promote librarians as adept partners for “big data” projects. Within the profession, this book is perhaps just the type of motivation needed to help solve job image problems, but if shared with a broader audience, the negativity may reinforce dismissive attitudes from those who don’t understand the profession. A second quandary was the author’s decision to exclude illustrative case studies from the field of research and information management. Although **Affelt** notes that her selection of industries was based on the early adopters of “big data,” perhaps it misses the opportunity to not only educate, but also to equip librarians, during a

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Reviewed by Jennifer Rinalducci (Art & Art History Librarian, George Mason University Fenwick Library) <jrinaldu@gmu.edu>

Digital Humanities is an ever growing field of study, and as a result more librarians and archivists are being required to incorporate these concepts into their work. **Arjun Sabharwal’s** work **Digital Curation in the Digital Humanities** addresses part of this need by focusing on the role of digital curation in archives and special collections. **Sabharwal** is currently the Associate Professor of Library Administration and Digital Initiatives Librarian at the University of Toledo Libraries and has a background in archives administration. He is well placed to discuss the implementation of digital curation since his primary duties include digitizing manuscript collections, managing digital repositories, and proposing new digital projects.

By focusing on digital curation, the author goes beyond the well-established discussions of digital preservation in archival studies. He sets up a dichotomy between the stagnant idea of preservation and the dynamic concept of curation. In contrast to digital preservation, digital curation provides a framework for selecting, promoting, and adding value to digitized and born-digital collections. In fact, definitions are important throughout the book, whether the author is addressing the concepts of digital curation and digital humanities or digital history and digital historiography.

**Sabharwal** provides both theoretical and practical perspectives on digital curation and its role within the larger field of digital humanities. This is a necessary combination given the complex nature of the subject. Digital curation allows for continued access to primary data and cultural heritage while these new technologies allow scholars and practitioners to approach humanities topics in new ways and see new connections.

Each chapter addresses key elements of the curation process, such as collaboration, interdisciplinary scholarship, and information architecture. However, the lifecycle of the digital curation process remains an overarching theme throughout the book. As a result, the author is able to tie together the conceptual, theoretical, and practical perspectives of curation within the larger digital humanities framework.

The book provides several useful and even some unique features. A key feature is how the author illustrates the theory by discussing practical applications. The real-life examples demonstrate the larger theoretical concepts of the digital humanities. The list of references is also a valuable survey of the current literature and online tools. **Sabharwal** also provides an in-depth study of the role of social media in the world of social curation. He reviews several online resources, like YouTube, Instagram, and Storify, and explains how they can be used as digital humanities tools. Overall this book is recommended for those who want to better understand how current practices can be used to improve the curation of special collections and archives for both teaching and research needs.
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The second edition of the Encyclopedia of Islam and the Muslim World (2016, 9780028662725, $489) published by Macmillan, part of Gale Cengage Learning has just been released. Updating the 2004 version, the set is again edited by Richard C. Martin and contains 540 articles by more than 350 scholars arranged alphabetically in two volumes. According to Mr. Martin the second edition has some 260 entries that are new or have been revised as well as “more than 350 photographs drawings, maps and charts... nearly twice as many as the first edition.”

Like its predecessor, the scope here is broad and expansive, employing a multidisciplinary approach. Articles deal with individual aspects of a number of larger themes like art and architecture, language and literature, law, the economy, education, and the sciences. In addition, there are essays that delve into the specifics of family, ethics, and society, as well as those covering important organizations and political movements, and of course, various Islamic religious sects, sites and practices. Entries have also been included that focus on those countries and peoples who identify themselves with Islam as well as major Muslim cities.

The individual entries are factual, descriptive and provide relevant analysis while at the same time offering useful historic context. There is an obvious attention to scholarship throughout the set with each entry being signed, including the academic credentials and affiliation of the author. Entries can run from brief explanations and definitions to long involved essays. The articles are cross referenced and each has a bibliography appropriate to the length of the entry. Unfamiliar concepts and terms are usually explained in the article but there is also a useful glossary. Other value added features include a very useful thematic outline, a thorough and comprehensive index and a multi-part chronology divided by world regions. Perhaps one of the most impressive features of these two volumes is the attention to quality illustration and layout contributing to a truly handsome presentation. The use of numerous color plates, maps, and attractive side bars makes this reference stand out.

The Encyclopedia of Islam and the Muslim World is a truly impressed effort. It provides students and serious lay readers with an academic reference that is scholarly and well researched but reader friendly. Expertise is drawn from a number of disciplines and editor Richard C. Martin is at pains to note that the contributors come from a highly diverse collection of international scholars. The coverage is broad and inclusive with top-notch production values that visually enhance both volumes.

The Encyclopedia of Islam and the Muslim World should find a place on the shelf next to other standards in the field like The Oxford Encyclopedia of the Islamic World (2009, 9780195305135, $795) and the Encyclopedia of Islam (Brill, 2007-. ISSN 1873-9830, $139 per volume).

(The set is also available via GVRL – Gale Virtual Reference Library.)

The SAGE Encyclopedia of Cancer and Society (2016, 9781483345734, $495) is a second edition of a title that was first published in 2007 and received a 2008 Editors’ Choice Award from Booklist. Once again the editor is Graham A. Colditz who has assembled some 280 contributors to write the more than 600 articles contained in the set half of which have been revised along with 30 articles that are new to this edition.

As one would expect, these three volumes contain numerous articles on the specific forms of cancer. But equal emphasis is placed on the behavioral and social factors that both cause, prevent, and relieve cancer.

Given that, there are articles that discuss carcinogens and prevention as well as treatments and therapies, not to mention related societal issues like poverty, the environment, and life style choices. In addition, there are entries that describe cancer in over 120 countries from Afghanistan to Zimbabwe as well as those covering major hospitals and treatment centers, numerous cancer related associations and pharmaceutical companies.

As befits a topic of such importance, the articles are fact filled, detailed, and objective. The approach is scholarly and informed by current research, while at the same time, the results are intelligible to the interested lay reader as well as to undergraduates and graduate students. Of necessity, medical terms are used, but they are described and explained within the entry, and in addition there is a useful glossary. “See also” references and further reading lists are included for all articles. The arrangement is alphabetical and for finding aids there is a Reader’s Guide that gathers articles into broad categories as well as a helpful general index. There is also a resource guide in volume three that lists a variety of relevant books, journal titles, and websites. In addition, there is an appendix that contains the Surveillance, Epidemiology and End Result (SEER) statistics from 1975-2011.

The SAGE Encyclopedia of Cancer and Society offers researchers a comprehensive, well designed, and accessible resource. With these three volumes, editor Graham A. Colditz and his contributors provide a valuable service in describing and defining the problems cancer poses worldwide, along with the forces and various methods being used to combat it. They offer a significant amount of useful and relevant information as well as a starting point for more extensive exploration. Most academic libraries would do well to give it serious consideration. It might also find space on the shelves of larger public libraries where there is interest.

(SAGE Encyclopedia of Cancer and Society is also available full text on the SAGE Knowledge online platform.)

Another second edition that should be up for consideration is Salem Press’ Forensic Science (2015, 978-1-61925-729-0, $364; e-ISBN: 978-1-61925-730-6, $364) edited by Ayn Embar-Seddon and Allan D. Pass. This is a three-volume set that explores the use of science in criminal investigation to accumulate evidence in solving crimes. However, it also discusses the broader role that forensics plays in civil cases and in identifying victims of accidents and natural disasters. In short, the editors and their contributors try to offer an academic but real world approach to what admittedly has become a popular topic of discussion due to TV crime shows and the media.

As such, while Forensic Science covers topics like poisons and antidotes, gunshot wounds, and blunt force trauma, there is also coverage of the role of forensics in art forgery, product liability, and accident investigation and reconstruction. In addition, specific types of crime are covered in greater depth. Of the three volumes, volume three focuses on the role of forensics in art forgery while the second volume covers the categories of evidence and the basic principles and methods utilized in a crime lab. It might also find a place on the shelf next to upper level criminal justice courses.

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evidence are discussed in individual entries as
are various branches of forensics ranging from
forensic accounting to forensic psychology.
There are also articles that discuss profession-
ally oriented aspects of forensics ranging from
specific tools and methods to relevant associations
and institutes and from key publications to the
importance of professional ethics.

The articles vary in length from 500-3,000
words and are written in a straightforward and
descriptive style. Each entry starts with a brief
definition of the topic and an indication of its
significance. The remainder of the essay offers
a clear explanation of the topic that provides
relevant and useful information as well as of-
fering a firm foundation for further research.

Sidebars are used to emphasize certain ele-
ments within a topic and as you would expect,”
“see also” references guide readers to related
articles. In addition, there is a category guide
in the last volume that is helpful in grouping
articles into broad subject areas. All entries
have brief bibliographies. The set is not heavily
illustrated but includes black and white photos
as well as some tables and charts interspersed
throughout each volume. Overall the entries
are well organized and the layout is inviting
and readable.

The second edition of Forensic Science
is a scholarly, fact-based treatment of a topic that
has grown substantially in interest and popular-
ity. The essays are succinct and accessible and
provide a resource that will be appreciated by
high school students, undergraduates and the
informed lay reader. Libraries interested in a
handy, less involved treatment may also want
to consider A Dictionary of Forensic Science
by Suzanne Bell (2013, 9780199594009, $21.95;
University Press. 

Extra Servings

According to their Websites a number of reference publishers are releasing some new
and upcoming titles including:

• The SAGE Encyclopedia of Theory
in Psychology (May 2016, 9781452256719, $375) is a two-vol-
ume set edited by Harold L. Miller, Jr. of Brigham Young University
that “drawing together a team of
international scholars... examines the
contemporary landscape of all
the key theories and theorists, pre-
senting them in the context needed
to understand their strengths and
weaknesses...”

• The SAGE Encyclopedia of LGBTQ
Studies (May 2016, 9781483371306, $595) is a three-volume set edited by Abbie E. Goldberg of Clark
University that “examines and ex-
ploring the lives and experiences of
Lesbian, Gay, Bisexual, Transgender and
Queer (LGBTQ) individuals, focusing on the contexts and forces

that shape their lives. The work focuses on LGBTQ issues and
identity primarily through the lenses of
psychology, human development
and sociology, emphasizing queer,
feminist and ecological perspectives
on the topic...”

• The SAGE Encyclopedia of Corpo-
rate Reputation (July 2016, 9781483376516, $375) is a two-vol-
ume reference edited by Craig E.
Carroll, visiting scholar at New
York University that for the first
time, explores “the vast and import-
ant field of corporate reputation... in the format of an encyclopedic
reference. The SAGE Encyclopedia of Corporate Reputation compre-
hensively overviews concepts and
techniques for identifying, building,
measuring, monitoring, evaluating,
maintaining, valuing, living up to
and/or changing corporate reputa-
tions...”

ABC-CLIO/Greenwood has also added a
couple of new titles:

• Folktales and Fairy Tales: Traditions
and Texts from around the World, 2nd Edition (Feb. 2016, 978-
1-61069-253-3, $415; eBook, 978-1-
61069-254-0, call for pricing) is
a four volume work edited by Anne
E. Duggan and Donald Haase, with
Helen J. Callow that “is the only
multivolume reference in English
to offer encyclopedic coverage of
this subject matter. The four-volume
collection covers national, cultural,
regional, and linguistic traditions
from around the world as well as
motifs, themes, characters, and
tale types. Writers and illustrators
are included as are filmmakers and
composers — and, of course, the
tales themselves...”

• Asian American Culture: From
Anime to Tiger Moms (March 2016,
978-1-4408-2920-8, $189; eBook,
978-1-4408-2921-5, call for pricing) edited by Lan Dong
“provides comprehensive coverage
of a variety of Asian American cul-
tural forms that enables readers to
understand the history, complexity,
and contemporary practices in Asian
American culture. The contributed
entries address the diversity of a
group comprising people with geo-
graphically discrete origins in the
Far East, Southeast Asia, and the
Indian subcontinent, identifying the
rich variations across the category of
Asian American culture that are key
to understanding specific cultural
expressions while also pointing out
some commonalities...”

Salem Press also has two new titles:

• Defining Documents in American
History: The 1960s (1960-1969) (April 2016, 978-1-61925-888-4,
$175; e-ISBN: 978-1-61925-889-1,
$175) is a single-volume resource
that “provides students and research-
ers new insights into the 1960s in the
U.S., through an in-depth analysis
of forty important primary source
documents and their lasting effect
on American history...”

• Fashion Innovators (April 2016,
978-1-61925-893-3, $145; e-ISBN:
978-1-61925-890-9, $145) is a
two-volume set that provides “bi-
ographies of nearly 200 individuals
who had an innovative and influen-
tial impact on the development and
evolution of the modern fashion
industry...”

And last but not least, Oxford University
Press is planning some new releases:

• The Oxford Handbook of Music
Therapy (March 2016, 9780199639755, $185) edited by
Jane Edwards is intended for “the
entry level trainee — meaning stu-
dents of music therapy can easily
locate information they need for
assignments and learning about
clinical populations in preparation
for placement; each model of prac-
tice is presented by the founder or
international leader in the approach,
resulting in an authoritative text...”

• The Oxford Handbook of the
Prophets (Sept. 2016, 9780199859559,
$150) edited by Carolyn Sharp
offers a “wide-ranging discussion of
ancient Near Eastern social and
cultic contexts; an exploration of
focused topics such as the person
of the prophet and the problem of
violence in prophetic rhetoric; and
sophisticated historical and literary
analysis of key prophetic texts...”

Book Reviews

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period when the profession could most benefit
from applying “big data” techniques to solve
complex library and information science prob-
lems, generate economies of time and promote
monetary savings for their own institutions.

Despite the seemingly negative tone
towards our profession, this text remains a highly
useful reference. By taking emerging and
complex issues and breaking them into bite-
size morsels, the benefit extends to those who
want to serve more effectively in their current
role and educates prospective information
professionals. With the book’s aerial view
highlighting the frequent intersections where
“big data” creates problems and information
science provides answers, some readers may
even be on their way to exploring new career
paths by reading this book.

<http://www.against-the-grain.com>
ATG Interviews Rosann Bazirjian
Dean of University Libraries, University of North Carolina at Greensboro

ATG: Rosann, collection development has been a major focus of yours throughout your career. What do you make of the current state of library collections? Are they as important as they once were? What do you think the future holds for library collections and their use?

RB: I think that collections will always be important. They represent content and research and are still very much the backbone of libraries. Collections are still a big part of the “product” that libraries provide to our students, faculty and scholars. I also believe that electronic content is critically important to our students as they work on class assignments and pursue scholarly endeavors. Students are using our electronic collections, and are likely not even aware that they are doing so. As important as collections are, libraries offer so much more than that. For example, collaborative work spaces that provide the latest technologies are a huge reason students come to libraries. They are or they may not be using our content when they are working in these types of spaces. Also, libraries provide spaces to work on digital media projects, or places to practice presentations or create 3D models. I think that collections will always remain the backbone of our product, but students and faculty see us as offering so much more than that now.

ATG: You have been praised for having a deep commitment to diversity. The library at UNC-Greensboro has been a leader in this area. But we wonder, do you think that libraries are doing enough to promote diversity both on campus and in the library? Is diversity adequately reflected in library services and collections?

RB: I am so proud of what our Libraries have done regarding diversity and inclusion initiatives. We are recognized on campus for all of the initiatives we have undertaken. Our Diversity Resident Librarian program is stellar, and the four librarians who have been our diversity residents were very active on campus. In addition, our Diversity Librarian has won national honors and sits on many high profile committees on campus. He played a critical role in the creation of a Faculty Senate Diversity Committee. These are just a couple of examples among a large number of diversity initiatives we have in the Libraries. To answer your question, UNC-Greensboro promotes diversity on campus and in the library. I know that there are many other libraries nationwide that have residency programs and who follow strategic guidelines for diversity and inclusion both in their libraries and on campus. I think that more can always be done. Many libraries are working on doing more, and have consulted with us on ways to accomplish more. I know that we can do a better job at hiring more diverse staff members and faculty. At UNC-Greensboro we try to provide diverse collections and acquire products in different languages but more can always be done.

ATG: Innovation is also recognized as one of your strong suits. As you look back on your career, which of your many innovations are you most proud?

RB: That’s a tough question. I think simply providing an environment where the staff and faculty can feel free to take risks and think creatively is a huge achievement. We have had many library faculty members and staff win awards for their innovative work. That can’t happen unless they feel that they can be innovative in their work. For more than six years we have awarded a $2,500 Innovation and Program Enrichment Grant to a staff member who submits the most creative proposal. I have to acknowledge my colleague Joyce Ogburn who discussed an innovation award she was sponsoring when she keynoted our very first entrepreneurial librarian conference. I loved the idea, and started a similar award at UNC-Greensboro. I have to think that this annual grant award is what has imbued the spirit of creativity and innovation among the library staff.

ATG: You were the driving force in the creation of the Conference for Entrepreneurial Librarians at UNC-Greensboro. Can you tell us more about that? Why is an entrepreneurial spirit so important to librarianship? We are not often thought of as being entrepreneurial. Are there ways the profession can change that perception — aside from sponsoring relevant conferences?

RB: I created the conference in 2008 at a time when “entrepreneurism” seemed to be the new buzz word nationally and on campus. I believed that libraries were entrepreneurial, but we were not being mentioned. I felt we were being overlooked. I met with Lynn Sutton, my colleague at Wake Forest University, to run the idea of an entrepreneurial conference for libraries by her. We discussed the format and the goals for the conference. We co-sponsored what has become a biennial conference hosted alternatively at our two universities. Attendance has been growing over the years. We need to be entrepreneurial and we need to be recognized for that. I think the budget crisis that has touched so many of us makes this even more important. Aside from the conferences, I think that offering a competitive innovation award, as I mentioned above, is another good way to foster the entrepreneurial spirit.

ATG: You are also a big proponent of professional growth and development and encourage colleagues to publish and serve in professional organizations. What are the key benefits for librarians in this kind of involvement? What positive results in improved library services have you observed resulting from librarian professional growth and development?

RB: Yes, I strongly believe that we need to contribute to our profession. Publishing articles and books as well as presenting at national conferences and serving on national committees are an important way we can do that. I think it is important that we contribute to the scholarship of librarianship. When I first arrived at UNC-Greensboro, I increased funds to support professional travel. Professional Development is critical — it is important to attend conferences and meetings to grow as an individual and to bring ideas back to your library that you can try and implement. I always go to conferences with the idea of bringing back new ideas that we can try. One result I see is that my library faculty are constantly being asked to speak at conferences because of their expertise and because people see them at conferences, read their publications and have heard them speak on topics such as information literacy, our new liaison model, e-publishing trends, diversity, and assessment to name just some. This sharing of knowledge is so important.

ATG: At the risk of sounding self-serving, we have to ask: how did being a major contributor to the Charleston Conference and Against the Grain influence your own professional growth and development?

RB: Being a major contributor to the Charleston Conference and Against the Grain changed my professional life in ways that likely cannot be described. Katina changed my life! Without her knowing it, I continued on page 42.
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she served as a mentor to me. I went to my first Charleston Conference in 1987 when I was the Head of Acquisitions at the University of West Florida. After meeting Katina and shortly thereafter letting her know that I wanted to get more involved, she invited me to edit two columns in ATG — Group Therapy and Bet You Missed It. Eventually I became an editor of ATG, and then led the conference planning committee. Without the involvement at the Charleston Conference, I feel as if my professional life would have been different. I met so many people and learned about so many new and innovative things that my fellow librarians we doing. People started to know my name (Bazirjian is not a difficult name to forget) and I had a network of people I could learn from and grow with. I was even awarded the ALCTS Leadership in Library Acquisitions Award based on my involvement with the conference. It all started with Katina.

ATG: Speaking of librarianship as a profession, what would you tell someone thinking about it as a career? Would you recommend they sign up for library school and take the plunge?

RB: I am retiring and still tell people how much I love my profession and will miss it. There have been so many changes to this profession since 1980 when I began my career at the Syracuse University Libraries. It is likely those changes that have sustained my interest in the profession. It is constantly changing and constantly exciting. I have no regrets telling prospective LIS students to take the plunge. This profession will continue to grow and change and meet the needs of our students and faculty in new and exciting ways. That is part of the charm and challenge of this profession. We need to keep changing to remain a relevant part of their lives.

The University of North Carolina at Greensboro

Rosann Bazirjian

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BORN AND LIVED: The Bronx, New York.
EARLY LIFE: Wonderful memories growing up in the Bronx with my two sisters and many Armenian relatives!

PROFESSIONAL CAREER AND ACTIVITIES: I started out in Acquisitions as a para-professional at Columbia University. My first professional position was at Syracuse University as the Acquisitions Librarian (1980). I went to work at the University of West Florida as the Head of the Acquisitions Department in 1985, and then as Head of the Acquisitions Department at Syracuse University in 1990. That position became the Head of Bibliographic Services when cataloging and acquisitions functions were merged. From there I went to Florida State University as the Assistant Director for Technical Services. In 1999, I went to Penn State as their Assistant Dean for Access and Technical Services. Finally, in 2004 I became the Dean of University Libraries at UNC-Greensboro.

FAMILY: A husband, son and beautiful daughter-in-law. Two wonderful sisters, a niece, nephew and his beautiful wife.

IN MY SPARE TIME: What spare time? I love to travel and look forward to annual trips to Europe every November, and the Dominican Republic in March.


PET PEEVES: Things out of place, stoppiness.

PHILOSOPHY: I don’t have a philosophy that I live by.

MOST MEMORABLE CAREER ACHIEVEMENT: Being the President of ALCTS and winning the Leadership in Library Acquisitions Award.

GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW: I hope to be enjoying my retirement — living a happy and healthy life.

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<http://www.against-the-grain.com>
ATG Interviews N V Sathyanarayana
Chairman and Managing Director, Informatics (India) Limited

by Tom Gilson (Associate Editor, Against the Grain) <gilson@cofc.edu>

and Katina Strauch (Editor, Against the Grain) <kstrauch@comcast.net>

ATG: Sathya, you started your career as a librarian for a number of institutions and agencies and then went on to found Informatics. What inspired you to leave a relatively secure profession and take the risk of starting your own company?

NVS: The best time to take risks is when you have little to lose. It is hard for me to figure out just one factor that drove me to this decision. I was still young then, in the seventh year of my professional career and holding my fourth and last job. There was a kind of itching to do and be something different. All the four jobs I went through before starting Informatics, two in academic and two in corporate, gave me a good exposure with lot of learning about the market and end-user perceptions. I was lucky to be heading the libraries in three of the four institutions except that the second and the third jobs were single person libraries. The exposure I had in my third job at Smith Kline & French, India (now Glaxo Smith-Kline) to the information intensive research and corporate environment, and the value and cost perception of information products and services by the user community excited me about the potential opportunities to create such products and services. It was a feeling then that I could do something better and different in the information space by looking beyond the library for my growth. Also, I must say that I didn’t leave my profession as you asked. It was in a way a continuation of my professional learning in the industry side of the profession.

ATG: Did the skills that you developed as a librarian help in making this transition? If so, which ones? What additional skills did you have to develop to be successful?

NVS: Yes, very much. The whole business idea was information-search centric, but based on the library resources. What I did for my earlier customers will give you an idea. One of my very early customers was an R&D manager of a small pharmaceutical company who was looking for some help in finding literature that could solve some quality related issues he was facing. The fact that I had worked in a pharmaceutical company gave him confidence that I could help him. I compiled a bibliography using Chemical Abstracts. He found a few articles that could help him and asked me to get them, which resulted in the document delivery business. I took the help of local libraries, one of them where I worked, and the British Library, UK to deliver them. The service further led me to arrange translation for a German article leading to have a translation division supported by a panel of translators. I took a membership in a large academic library, where I had worked for over a year, which helped in my early days of mediated search and fulfillment. A little later, he wanted me to review and prepare a report on all available processes for increasing the yield of one of his products (Vitamin C). This is something that needed domain knowledge beyond my basic familiarity with the industry. I hired a researcher as a freelancer and we did this work together. It was a new learning experience, throughout, with changing technologies and market needs.

ATG: In 1984 Informatics pioneered the introduction of International online database access via telex and four years later you introduced CD-ROM technology to India. Can you tell us about those early days?

NVS: Very exciting! As I told you earlier, I started my business as an Information broker, going to libraries and searching printed A&I products manually. It was also the time when Dialog, SDC and BRS had just started. There was an exciting experiment in India in the late 1970s at one of the international library conferences organized by an Institute in atomic energy research where online search was demonstrated connecting to a European database search System (ESA-IRS) using an expensive dedicated line that was rented just for three days. A connection of that kind in those days would cost about U.S. $125,000 a year! The excitement of instant access from a remote terminal and interactive searching triggered interest in me to find ways to go online for our search business. That was the time when Indian telephone systems did not even have direct dial facilities to make an international call, which was so until mid 1980s. A friend of mine (Dr. Subrahmanyan) who was teaching in the library school at Drexel University connected me with Charles Bourne in Dialog to explore the options for using online. I visited Dialog in Palo Alto in 1984, and attended their basic training program in online searching. In those days even the U.S. was using telephone lines connected to tele-typewriter terminals using acoustic couplers (acting as modem). It was still a pre-microcomputer period. I discovered then that the local telephone lines used for online searching in U.S. were going through one of the three data networks, which also supported login through telex lines. Telex was a direct data network, which did not require a phone line and a modem. That is how we started using and promoting online searching through telex. It was expensive, costing U.S. $2 per minute in those days. But, with thorough planning of what databases to search and how to search them we could complete a good search in 3-5 minutes using nested logic for presenting search queries. We would store the query offline and submit it online. Results would of course follow offline by airmail in seven days, as it was prohibitively expensive to print it online. I can tell you, a bit sadly, that the art of doing a quality search and getting precise results is simply missing due to googalization of search. People spend more time today getting nowhere! Live interaction with a mainframe computer some 15,000 miles from India to instantly get responses was the most thrilling experience not only for me but also for our users.

The first most expensive technology investment we made in those days was an electronic telex machine costing a fortune then. International direct phone dialing was introduced in India in the mid-1980s (costing around U.S. $4 per minute). PCs came in around the same time. This eased the situation. But, telephone lines were still not a reliable and affordable channel then. The first international data network was launched in India in 1990. This was the phase of pre-Internet online in India, which ruled until late 1990s. In those days, the Government owned Indian Telecom Company which had set up the first packet switched data-network in India encouraged us to set up online search centers in their building on a profit-share model by providing us all the required infrastructure and high-speed dedicated data line free of cost in two cities (Mumbai & Delhi). This generated significant interest in the corporate sector to come and use our online search facility.

Our fun and frustration filled pre-Internet online days helped us in building an early market in India for CD-ROM databases. We sold the first CD-ROM database in India in 2008 (MEDLINE for U.S. $5000 annual subscription from Silver Platter) and CD-ROM drives for U.S. $2,500/drive, and several CD-ROM networking systems later. We started our own CD publishing activity in the mid-1990s. We developed and published a few database products, both bibliographic and full-text. To
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This 1% is almost entirely the market shared by information market, which is relatively small, the OA domain a few years ago. Indian libraries published by them. The lobbying by institution is a lead player with more than 15 at the national level. A government-funded level including a limited level of lobbying wave has caught on widely at the awareness paid content market in India. But, the OA and growing economy but also a developing business strategy completely.

Agents forced us to re-define our distribution business. The regulatory changes in the country in 2012 concerning tax laws and distribution business provided sustainability (until three years ago), and spent on creating products. Our CD-ROM publishing could not take as we were too ahead of the time. We shifted our technology strategy from CD-ROM back to online as the Internet was promising a better and more affordable online experience. Internet and the emerging web, and the experience in the database distribution business helped us to conceive J-Gate, our flagship product.

As far as your distribution services go, the print journal subscription business still continues to be a main focus. With the continuing shift to digital journals, how long do you expect that to remain viable?

Not really. We started the distribution part of our business with print subscription products and moved quickly to e-content media beginning with CD-ROM products in the late 1980s and shifted to online products with the Internet taking off in India. By 2012, our e-content distribution was 80% of our total distribution business. The regulatory changes in the country in 2012 concerning tax laws and the refusal to accept these changes by international publishers for orders coming through Agents forced us to re-define our distribution business strategy completely.

India, of course, is both a vibrant and growing economy but also a developing country. How does the issue of Open Access impact your company and your customers?

There is no major negative impact on our business, or on the business of the paid content market in India. But, the OA wave has caught on widely at the awareness level including a limited level of lobbying at the national level. A government-funded institution is a lead player with more than 15 journals published by them. The lobbying by OA advocates led to moving their journals to the OA domain a few years ago. Indian libraries are quite active in setting up institutional repositories.

While the Indian economy is doing well, the same may not hold true for India’s scholarly information market, which is relatively small, perhaps around 1% of the global market. Even this 1% is almost entirely the market shared by a few major global journal publishers through big deals of a few library consortia. India’s scholarly journal market for the locally published journals is insignificant. I can estimate it to be around U.S. $10m a year.

We launched Open J-Gate, a subset of J-Gate to ride on the OA wave, in 2004. The launch was inaugurated by Prof. Jean-Claude Guedon, University of Montreal, Canada, a leading OA advocate. It was the largest database for OA literature then. It was used extensively consuming more than 90% of our hosting infrastructure! We had to find a way to monetize this product as the J-Gate, the mother database in subscription model, was still not earning enough. We had to withdraw Open J-Gate for sheer reasons of our not being able to move to a Google kind of advertisement and sponsorship based revenue model. We find the OA opportunity more promising now, an opportunity to come out with a new kind of product as a significant and wider expansion out of J-Gate. We are working on developing some new interesting models.

Informatics also serves publishers by providing editorial and compilation services including content review and editing, indexing and abstracting, not to mention Web research and analysis. Can you tell us a bit about that part of your business?

It is a smaller pie in our total revenue, but is slowly developing well. The trigger for this activity came from our thinking in early days of our startup to find global markets for Indian content. Encouraged by a small contract in the early 1990s from Predicast, a business database company in the U.S., we started abstracting and indexing Indian business sources for an international database, but retaining the copyright for the work we did which forced us to get a smaller price per record than we could have got otherwise. This contract helped us in expanding in two directions. It led to the India Business Insight Database, as a product. We developed a separate services division for doing contracted services which became our services division. A huge contract we got from Reuters in 1995, indexing close to a million news stories a year with turn-around time of less than 12 hours, taught us to manage large contracts. We did this by developing a team of home-based workers and connecting them to be online with our server through local telephone network. Reuters would upload the feed to our server, we would distribute this to

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our home-based workers who would index and upload back to us. We would quality check and upload back to the Reuters server. This was a great learning experience in technology set up and management of large-scale data projects. We developed our home-based workers on this experience. It is a pity that we didn’t build and expand our services division on this strength of early days. Perhaps, we got lost in the glory of the top-line that our distribution business started commanding beginning in early 2000.

ATG: Being based in Bangalore must be both challenging and enabling. There are probably hundreds of Bangalore companies that do information and processing services for the world’s information businesses. What makes Informatics stand out in that crowd? What competencies does Informatics have that the others do not?

NVS: We do stand out in our library-centric business vertical. The reason perhaps is the market perception that we are a technology company in the library space promoted and managed by a librarian. However, we don’t stand out so much in non-library-centric business verticals although we have a small business database called IBI (India Business Insight). We got stuck in our library-centric niche market which is a good but too small a market for an information company. This is a lesson which is now driving us to re-define our vision to expand out to a larger space of information market. As you know, Bangalore is popular as the Silicon city of India. Global players keep looking for companies here for high quality software professionals in many industry verticals. We have ready access to such talents here. Within Informatics we have the domain expertise for publishing, librarianship and information management related verticals. As a company guided by librarianship we have a good understanding of content organization and management, metadata standards, building ontologies, etc. We have a proven track record in product development capabilities with in-house talent in this area.

ATG: Getting back to your own products, many are sold only in India, but a few like J-Gate, an e-journal portal, are now being sold internationally. How has this market expansion affecting Informatics and its operations? What major adjustments has the company had to make to appeal to a global audience?

NVS: J-Gate today is the world’s largest database for journal literature by sheer journal count. We handle 45,000+ online available English language journals. Starting development in 2000, perhaps it was the first e-journal portal initiative in the world on the scale we planned. It is a very successful product in the Indian market. The level of customization we support in J-Gate by tailoring to the needs of individual or group of libraries is a key strength which should have enabled us to make this a great global product. The prime challenge is continued on page 46
branding the product to gain acceptance as a
global company from India. We also needed
bigger investments to add new features and
functionality to become globally competitive.
There was lot of resistance too from some of
the Ivy-league publishers in supporting us, by
misreading us as a potential competitor. Hence,
it took too long a time to be where we are!
We are happy today that people recognize us
to partner with us. This change will be a leap
forward for Informatics.

ATG: J-Gate, and its subset Open J-Gate,
seem to be your key offerings. Can you talk
more about them?

NVS: I will be happy to. We conceived
J-Gate in 1999, just when the Web-based
e-journal revolution had started. We started
working on J-Gate with a vision to develop
the single largest e-journal database and portal.
Very early on, we realized that our market in
India couldn’t support a product, indexing
thousands of e-journals, for two reasons. One,
e-journals were still far from the reach of
Indian libraries due to Internet infrastructure
limitation which was too slow to happen;
two, the number of e-journals subscribed by
libraries then was too small, in the range of
100-500. We changed the direction and
focused on a customized database, limiting
to the journals that libraries subscribed to,
which works as a product within the local area
network of the institutional campus. In effect,
we created a local discovery solution for the
libraries and their journal literature holdings.
We quickly expanded this concept to a group
of libraries and library consortium as a shared
discovery and resource-sharing solution. This
caught up the imagination of Indian library
consortia. The consortia modeled J-Gate
solution, popularly called in India as JCCC
(J-Gate Custom Content for Consortia), would
facilitate online access to e-journals by their
defined right-of-access to resources subscribed
by libraries, either individually or collectively.
By virtue of indexing articles from their print
journal holding also, JCCC facilitated inter
library loan when a user found an article in
a journal, which might not be subscribed by
his library. JCCC was adapted in 2003
by one of the earliest and largest Indian
Library Consortium. It is another matter
that big publishers didn’t like JCCC for
this reason. But, they couldn’t stop us, as
the libraries wanted it. However there is one
instance where surprisingly a leading not-for
profit publisher signed with a consortium to
make available his content to the consortium
for inter-library loan among its members under
CONTU guidelines, but threatened them and
us, several years after our service was in use,
with copyright violation for facilitating ILL.
Fortunately, he was the only one, an odd one
indeed!

J-Gate as a customized solution could have
been an ideal product for the big global library
bases and the consortia to adapt as an effective
discovery and resource-sharing platform in the
early days of e-journal evolution itself. We
marketed global e-journals in India extensively,
but we failed to get our unique e-journal dis
covery solution into the global market. I may
say, it is for journalists like you to analyze the
reasons for our failure to brand a great Indian
product in the global market.

ATG: It’s probably not a big revenue
opportunity for you, but you are the world-wide
distributor for S.R. Ranganathan’s journal,
SRELS Journal of Information Management.
Does that journal have an international
following?

NVS: Very little. We took over this
52-year-old journal only two years ago.
Ranganathan is a great universal brand in the
librarianship, like Melville Dewey. But

“People spend more time
today getting nowhere!”

buktu by Joshua Hammer. Just out. The
story of a librarian in Mali who arranged to
save hundreds of manuscripts from destruction.
Did you see the Phil Davis April 1 post
about Sci-Hub? Lolly talks about Sci-Hub in
her questions and answers column. And I had
an intriguing conversation about Sci-Hub with
Georgios Papadopoulos, Founder and CEO of
Sci-Hub. Wonder if we can get him to Charles
Hammer, Founder and CEO of Sci-Hub.

ATG: What about the future? What new
products can we expect from Informatics?

NVS: Our future plan is in two distinct di
rections: (1) to strengthen our library-centric
products and services to maintain leadership
in this market and go global. (2) expand our
market into many non-library domains of
the global information market place. Our
strategy is to be a “Technology + Content”
Company. We realize that in the digital world,
information products cannot be conceived or
pursued as a quickly scalable market without
the internal strength of technology. Pursuing
this strategy, three years ago we created a
new subsidiary company called Informatics
Publishing Ltd., which is now focusing on our
established library market. We are working
towards building technology strength within
our parent company. We plan to expand
into the new horizons of information market
place with this strength. You will see a few
new products in the coming years, which
may even be spun-off into new subsidiary
companies. We are, in some way, back to
start-up mode. 😃

Interview — Rosann Bazirjian
from page 42

restaurants in Myrtle Beach, so I am looking
forward to checking them out. I am also
looking forward to getting involved with
community events. Now that I am a South
Carolinian, I am determined to finish the
Anne Rivers Siddons novels that I have
yet to read. I love getting to know local
authors, so I will go to author events and
buy their books. I don’t know if I will be
doing anything library related after I leave
UNC-Greensboro. Everyone says that
when you retire, you shouldn’t make any
commitments for at least six months. It is
important to feel the rhythm of retirement
and then make any decisions regarding
committees, volunteering opportunities,
etc. I will definitely be in Charleston now
that I do not live too far away but solely as
a tourist! 😁

Interview — N V Sathyarayana
from page 45

have guessed! From the time George was
four months old, Sam (his dad) has been
reading George a real print book at bedtime
and George actually listens! Bruce and I were
reading to him in his dad’s absence and George
paid attention! Impressive!

Speaking of which, I read Mark Sandler’s
essay (this issue, p.26) with great interest.
Yes, students prefer not reading books. And
Websites may have more visitors than books, but
the print book is not going anywhere. Generations
have always liked to take the easy way out. But
I believe that as a profession we are focusing
too much on the fact that there are non more
competitors than we have ever had. But we
still need to preserve print books. Wow! Got
that off my chest!

Speaking of which, have you encountered
this book? The Bad-Ass Librarians of Tim-

Rumors from page 14

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<http://www.against-the-grain.com>
Blurring Lines — The Chapter, Not the Book, as the Unit of Discovery: An Interview with Laura Brown of JSTOR

Blurring Lines — The Chapter, Not the Book, as the Unit of Discovery: An Interview with Laura Brown of JSTOR

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ook publishers of all genres: textbook, professional/trade/reference and scholarly have all struggled with innovating in packaging, pricing and distribution. The most forward-looking have emphasized multi-channel and multi-partner digital distribution with strategic attention to preserving pricing power with restricted channel access to their very best sellers and taking different approaches to front-list/back-list and top-sellers versus lower-sellers in terms of available sales models. But, in truth, the majority of book publishers simply pursue a “spray and pray” strategy and hope that the digital revenue line increases sufficiently year-over-year as measured against key competitors.

The book has long been treated as a linear experience/device beginning on page one and ending on page x, all with the assumption the reader finds utility in this “technology.” Popular press titles certainly demand this approach (whether print or digital) but books used in the academy by students and researchers are rarely consumed cover to cover. Digital text-books link key terms in the chapter glossary to the line item entry within the text. Scholarly monographs or collections of contributed works facilitate via the table-of-contents quick links to the chapter of interest. And keyword searching within will take the reader to any relevant section they desire. With all this facility to drill down to chapters, sections, sentences within sections, etc. one would have expected more aggressive publisher uptake on product and business models that are increasingly granular. In my own experience with Business Expert Press, we forged a partnership with Harvard Business Publishing’s case program to align selected chapters from our books with selected Harvard cases; it was a very successful partnership.

Recently, I had the good fortune to finally meet, face-to-face, Laura Brown, Managing Director of JSTOR. As two former book publishers now working in thecontent aggregation and discovery space, our conversation quickly turned to the challenge of discovery and use eBooks face as compared to journal articles. Laura shared with me a recent simple but effective innovation undertaken by JSTOR to align eBook chapters in search and discovery with journal articles; in effect, disaggregating the book from its linear presentation of page one to page x. This conversation prompted the following interview:

Laura, was there a “light bulb” moment that prompted the JSTOR team to pursue chapter-level discovery?

We were convinced from the outset that including books alongside journals on the JSTOR platform would be of tremendous value for researchers and students. Because we are such a heavily trafficked global platform, with over 40% of our users beginning their research on JSTOR (rather than beginning on Google or elsewhere and then following a link to JSTOR), we believed that by bringing books into the digital workflow, we could help to make centuries of long form scholarship more discoverable and useful.

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At launch, we had decided the best path to discovery was through preserving the integrity of the whole book as a research object, and so we showed books alongside articles in search results. Over time, our data began to show that while users were clicking on tables of content at the rate we expected, they were not moving through to the chapter level. At the same time, our user experience research group had begun exploring the barriers to students including books in their research workflow. Two key findings emerged. 1) Many students held a mental model that books are physical things and that they would need to go to a physical place (library) to obtain one. They didn’t bother to click beyond the table of contents because their experience led them to believe that they would not get the text. 2) Books are long and it would take too much time/effort for them to find the portion of a book that is relevant for them.

This research led us to change our thinking. We began a/b testing chapters instead of books in our search results, and saw amazing improvements. Not only was there genuine excitement when students found highly relevant chapter content they could read and use immediately, but book usage showed a considerable spike. Based on these experiments, we decided to reengineer our user experience to make chapters the default search result.

**Why do you think book publishers, in general, are slow to innovate in packaging, pricing and distribution schemes?**

I think presses have been experimenting in many of these areas. They are publishing short works, making chapters available as marketing tools, launching new open access books programs such as UC Press’s Luminos, and even, in the case of MIT Press, offering online subscription products such as CogNet that include books and journals. One problem, though, is that many scholarly publishers aren’t big enough to have the resources to experiment with digital products beyond journals, and in many cases this experimentation can lead to the sort of disruptions that threaten their core print business for books. As a technology partner for both presses and libraries, and a trusted platform for users, it is our goal to help build the value proposition for digital books in such a way that all sides benefit. We are collecting data and sharing it with our publisher and library partners so that this innovation can play out in an evidence-based way, and not as a leap of faith.

**How long has your chapter-level discovery program been in place and how has this impacted your eBook DDA program?**

The chapter-level approach to discovery has been in place for 18 months. From the outset it showed immediate results in terms of driving discovery, but as we have added more titles to the DDA corpus, and more participating institutions, we are seeing an enormous rate of growth in books usage. For instance, just in the first two months of 2016, even before the semester really gears up, we are already at 40% of the total usage we saw last year — a much larger increase than we would have expected for the program, even given the number of new titles and the number of new participants. Libraries appreciate that they pay only for the books their patrons need and use, and most participating publishers are seeing year-over-year growth in the revenue that they receive from JSTOR (especially for backlist titles). These trends support our original hypothesis that, as was the case with the back issues of journals in JSTOR, there is great potential to unlock new value for monographs in a digital environment.

**Please describe the basics of your eBook DDA program.**

Most of our titles are available in both a firm upfront licensing option (“pick and mix”) and a demand-driven acquisition (DDA) option. Libraries can shape their DDA corpus to meet their disciplinary priorities and budget constraints, and we help them to do that based on usage stats from their participation in our journals Archive. Most libraries choose to give their users access to the entire books corpus. We allow a fair number of usage events — chapter downloads and views — before a book purchase is triggered in the DDA option. Libraries maintain deposit accounts with us from which triggered purchases are deducted, and they replenish them according to usage patterns. We provide weekly stats to them of usage activity, triggered purchases, and the status of their deposit account.

**Do you anticipate going even more granular? Can you envision a day when JSTOR is selling access to sentences, words?**

Now that we are seeing such promising results from one experiment to get readers to the information they value quickly, I think there are vast opportunities for innovation on both the navigational and business model fronts to help scholarly books thrive in a digital transition. The value of content in the digital environment is at least partly a function of how convenient it is to access as well as how convenient (or easy) it is to acquire or purchase. If you make content easy to find and purchase, much more of it will be used, and by many more users than ever before.

A bit of background on the navigation question: In a similar vein to the research we undertook with students, a survey of scholars revealed their research practices from my colleagues at Ithaka S+R revealed an interesting dichotomy in use cases for books. The study found that scholars tended to prefer eBooks over print books for basic research tasks, such as exploring references or searching for specific topics, but when it came to immersive reading, scholars preferred print books. A scholar might use an eBook as a sort of quick finding aid before turning to a print copy of the same title to read and digest the argument. (The S+R study is available here: http://www.sr.ithaka.org/blog-individual/stop-presses-monograph-headed-toward-e-only-future.) So, speaking in the most reductive way, there’s a “grab and go,” goal-oriented mode of reading books, and then there’s a more immersive, cover-to-cover reading experience. Right now, eBooks aren’t doing a fantastic job for either reading case. For the goal-oriented reader, the simple act of flipping through a printed codex can be transformed into a frustrating series of clicks and toggling between different PDF files; for the immersed reader, the eBook may lack functionality — such as the ability to annotate — that we take for granted with print books.

Can we do a better job of satisfying both needs? Can we design and prototype new means of navigating books — whether it’s a topic modeling approach that makes browsing a book by granular subject terms much easier to carry out, or an improved visualization of the place of any given book in the citation network of books and journals, or some other innovation — in a way that doesn’t rob the reader of the opportunity to engage with the long form argument that plays out in linear fashion from chapter to chapter? And of course, there’s a concomitant challenge: can we design user interface improvements that are scalable and affordable to implement across the many publishers and tens of thousands of books that a platform like JSTOR hosts? Those are big challenges, but I see a real payoff for authors, publishers, and librarians: improving the navigability of digital books in a way that makes both reading “use cases” easier, more efficient, and more appealing to all levels of readers, including undergraduate students. And that’s one area in which I’m hoping that JSTOR can make some valuable contributions to the community over the next several years.

I am also convinced that there is room for experimentation in business models. After all, DDA itself is one such new development that, in making scholarly books accessible to millions of potential readers, and demonstrating that value to libraries, offers real potential to revitalize scholarly monograph publishing. Whether the chapter will eventually be an alternative “unit of sale,” or something even more granular, is hard to predict. What I am convinced of is that the value proposition for books, driven by new forms of discovery and a groundswell of online usage, is good news for publishers and libraries alike. Rather than hold on to old expectations and models, we’ll all need to work together to find the right models to bring more books to more users in sustainable ways.
**Cases of Note — Copyright**

**Statutory Damages and Other Cool Contract Stuff**

Column Editor: Bruce Strauch (The Citadel) <strauchnb@citadel.edu>

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Yes, Americans will indulge in tattoos. Indeed, it takes an edgy rebel to go without one today.

Tattoo Art is a Virginia company with copyright on hundreds of colorized “tattoo flash” designs — original designs on a poster to give tattoo parlor customers ideas.

For when you’re blind drunk and getting that first tat of course.

So they wouldn’t have to pay to register hundreds of individual works, Tattoo Art put them into 50-sheet “Books” and did one registration for each book. It then licensed the designs for, of course, tattoos, but also for those must-have cell phone covers and t-shirts.

Indeed, the very foundations of the American economy.

In December 2005, TAT licensed from Tattoo Art specified flash drawings for airbrushed tattoos. Which is to say temporary ones.

For those not drunk enough or too timid to permanently stamp themselves with a steadily blurring hackneyed design.

There were quarterly royalty statements from gross sales, a minimal payment of $6,000 and blah-blah.

There was an initial term of three years and then an on-going year-to-year unless one party wanted to quit. If TAT quit, it could dispose of finished inventory. However, if Tattoo Art terminated TAT for breach, TAT had to end all sales.

TAT more or less admitted to all this, but claimed there was an oral modification eliminating the minimum payment and allowing TAT to sell off inventory even if terminated for breach. This agreement was made before the final acceptance went down.

Which is to say, TAT admitted it signed the contract despite its claim of alteration. TAT claims it understood the signed page was to be attached to a “revised” contract. Which never came. And TAT did nothing about it.

In fact, TAT made three of the four quarterly payments in 2006 for a grand total of $653. Out of the minimal $6,000.

And of course you can see what’s coming. Also what a pathetic business airbrushed tattooing is.

There was no further communication between the parties until 2009. Meanwhile, TAT had changed the coloring of some of Tattoo Art’s designs and displayed them on its Website. And — dum-da-dum — it labeled them TAT “Original Collection.”

This was followed by prod- ding from Tattoo Art and “the check’s in the mail” excuses from TAT. Whereupon Tattoo Art terminated TAT for breach and told them to quit using the designs forthwith. TAT ignored it and went its merry way. Tattoo Art sued.

TAT pled affirmative defenses of fraudulent inducement, unclean hands and equitable estoppel.

Hmm. I suppose dealing in tattoo art is unclean. Ha-ha. Joke. But what kind of a lie would induce you into such a contract? Our flash art will help you finally meet girls?

Tattoo Art won summary judgment and an order of $18,105.48 for breach of contract plus $480,000 statutory damages under the Copyright Act for the altered designs.

Ka-pow!

Well, that’s the end of their business. But lawyers can and will appeal if paid, so why not spend your money on that.

**The Appeal**

And so we find ourselves before the Fourth Circuit in Richmond.

Summary judgment is granted when there’s no material dispute as to the facts so no jury is needed. A judge can rule as a matter of law. Fed. R. Civ. P. 56(a). Tattoo Art had the burden of showing the absence of an issue of material fact. It achieved this by showing the signed contract and evidence of TAT not making payments.

TAT said a material fact was raised by its claim of an oral modification to the contract.

The court said npe. Nothing in the record, documents, depositions, affidavits, whatever, showed a contrary agreement.

This is kind of a round-about way of stating the Parol Evidence rule that claims of oral agreements prior to or simultaneous with the executed written one are not admissible in evidence. If the contract says “cow,” why should we let a silver-tongued liar testify they really meant “horse.” The writing is in front of us and is quite clear.

The court also noted a merger clause which said the written “Agreement constitutes the entire agreement and understanding between the parties” and any changes had to be in writing “signed by both parties.”

The court also noted that the initial term was three years. The Statute of Frauds requires a written contract for any agreement that can’t be performed in one year. Which they had. But the oral agreement was … well … oral and thus contrary to the Statute.

**Copyright Infringement**

And TAT was indeed an infringer. The license agreement permitted them to create stencils and promote them. There was no permission to modify or alter. Plus, when they ceased to make quarterly payments they were in breach and were to stop all sales.

For damages, Tattoo Art was entitled to actual damages or statutory damages under 17 U.S.C. § 504(c)(1) which can be fairly hideous — from $750 to $30,000 per infringement “as the court considers just.” If the infringement was willful, which this was, the damages can jump to $150,000 per.

For some odd reason, the district court couldn’t find willfulness. And this despite TAT labeling its infringement “Original Collection.”


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Questions & Answers — Copyright Column

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QUESTION: A university librarian asks under what conditions may a university “rip” a video and put it into a course management system? Is the process of “ripping” a violation of DMCA?

ANSWER: Under the U.S. Copyright Act, a course management system (CMS) is considered to be a form of distance learning or transmitted performance of audiovisual works. Therefore, the TEACH Act, section 110(2) of the Act applies. That section permits the performance of full works in the course of instruction via transmission except for audiovisual works. Only portions of those may be performed for a class without permission. To show the full work, permission is required.

The first step should be to try to purchase the work with performance rights for use in a CMS. If it is not available for purchase, then copying a portion of a video to show in class or to put on a CMS is permitted, if the other conditions contained in section 110(2) are followed.

Under the Digital Millennium Copyright Act (a 1998 amendment to the Copyright Act), there is an exemption for use of videos in the course of education which have technological controls that prevent their use. Every three years the Register of Copyrights is charged with rulemaking responsibility for determining classes of works that should be exempted from the section 1201 (part of the DMCA) prohibitions on circumvention. There is now an exemption under this rulemaking for educational uses by college and university faculty and students. So, if there is no version available for purchase which does not have anti-circumvention controls, then a school may rip the video. However, only portions of it may be performed or posted on a CMS for direct performance for a class (section 110(2)) without permission of the copyright holder.

QUESTION: An archivist asks the following about building museum collections on the civil rights movement with materials focusing primarily on the 1960s. Many of these archival collections may contain photographs and papers gathered by that collection’s donor. The donor was not the creator of a particular photograph, etc., and thus could not transfer copyright of those photographs archives. In many cases, it may be impossible to determine the originator/creator of the photographs. (1) Since the archives may be providing reproductions of photographs and artwork for display in the museum, and the primary purpose of both entities is to serve as an educational institution, would the use of reproductions solely for the museum’s exhibits be allowed without seeking copyright permission from the originators/creators? (2) If the museum does not use the images on items to be sold in the gift store or similar products, does this relieve any concerns about infringement? The museum will charge an admission fee, however this is for operating costs and not as a source of profit.

ANSWER: (1) As a general matter, good purpose does not excuse copyright infringement. Typically, reproduction for display without permission of the copyright owner is infringement. The archives may find some help under section 106 of the Copyright Act, however. The difficulty will be in determining whether the photographs’ copyright terms fall within the last 20 years of the term of copyright. The chart at http://www.unc.edu/~unclng/public-d.htm will help in determining the term of copyright based on the work’s publication date.

Many of these works from the 1960s are not yet in the public domain because the “author” has not been deceased for 70 years.

Most libraries and museums go ahead and use these items from their collections for display, reproduction, etc. It is useful to use a disclaimer about the fact that the copyright status of the work is unknown and that if the author comes forward, the institution will be delighted to include the notice of copyright.

While there is some risk in doing this, it is most likely that such use would be determined to be a fair assuming that archivists have done all they can to locate authors and seek the necessary permissions.

(2) It probably is a good idea to limit the use of such reproductions to display and to avoid using the images on products that will be sold in the museum store. Typically, it is understood that museums charging an admission fee is to underwrite museum costs and is not for commercial purposes.

QUESTION: A college librarian asks for clarification about the recent report from the U.S. Copyright Office about the making available right in this country.

ANSWER: The United States is a party to two international treaties that are collectively known as the WIPO Internet Treaties. Signatories to these treaties are required to provide a right that gives copyright owners the exclusive right to authorize the on-demand transmission of their works to the public. This country never enacted that exact language in its copyright law, and the question addressed by this study and report from the Copyright Office is whether, under a combination of various provisions of the Act, the U.S. government has provided the substance of the making available right.

The treaty provisions were forward looking and included language where the impact of technological advances was embodied without having to go back and amend the treaty provisions. The United States ratified the treaties in 1998 which necessitated several changes in the copyright law via the DMCA. The government has consistently maintained that, taken together, the section 106 exclusive rights provided by the Copyright Act encompass the making available right. The Register’s February 2016 Report concurs with this opinion but suggests that the Congress continue to monitor court opinions so that it can provide legislative clarity should that prove necessary.

The full text of the final report is available at: http://copyright.gov/docs/making_available/.

QUESTION: Why is Elsevier trying to shut down Sci-Hub which provides an excellent service to scientists around the world?

ANSWER: In 2011 a researcher from Kazakhstan created Sci-Hub that provides free access to over 48 million peer-reviewed articles. The researcher did not have permission to create the database of articles which is referred to as a “Pirate Bay” for scientific articles. So, the quick answer is that the reason Elsevier is trying to shut it down is because it is copyright infringement.

The federal district court for the Southern District of New York issued an injunction and ordered the site to shut down in October 2015, but the researcher is refusing to do so. Newspaper accounts highlight the argument as being about who owns science.

Not surprisingly, the site has been very popular in developing countries. The articles are available without a subscription, and according to the researcher, there were approximately 80,000 visitors to the site each day. The lawsuits claimed that Sci-Hub illegally accessed the accounts of students and academic institutions to provide free access to articles through the Elsevier platform, ScienceDirect. Because the site is hosted in Russia, it is difficult to shut down the site. The researcher cited Article 27 of the U.N. Declaration of Human Rights “to share in scientific advancement and its benefits” as justification for creating the infringing site and claimed that Elsevier’s business model is illegal. While the domain name Sci-Hub was seized in the suit, the site is still available through alternate Websites. The suit continues and claims irreparable harm which experts predict Elsevier will win the suit for $750-$150,000 for each article. In other words, millions of dollars in damages. Collecting those damages may be difficult, however, due to the location of the researcher.

QUESTION: A public librarian asks about reports of the federal government. When a private publisher republishes a federal government report but does not change continued on page 51
**Questions & Answers**

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the content are these protected by copyright?

**ANSWER:** Works published by the U.S. government are not protected by copyright according to section 105 of the Copyright Act. So, the only material that can be protected in a work that incorporates works of the federal government is any new material added such as a preface, editorial comments, explanations, etc.

The notice section of the Act provides that a copyright owner may place a notice of copyright on works, and that notice includes the name of the copyright owner, the date of publication and the symbol ©, the word “copyright” or the abbreviation “copr.” Section 401(d) states that the good faith defense is not available to a defendant in a copyright infringement suit if the work in question contained the notice of copyright. Section 403 says that the good faith defense is available to a defendant in a copyright infringement suit if the work in question consists predominately of one or more works of the U.S. government unless the notice of copyright does not contain a statement, either affirmatively or negatively, that notice includes the name of the copyright owner, the date of publication and the symbol ©, the word “copyright” or the abbreviation “copr.”

**Cases of Note**

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Then the court did agree the infringement fell closer to the willful end than the innocent end of $750 to $30,000 and set the damages at $20,000 x 24 infringements.

On appeal, TAT argued that the $480,000 was grossly disproportionated to any actual damages suffered by Tattoo Art.

Which while true, is interesting given that TAT was pretty clearly willful and should have been up in the $150,000-each range.

The 4th Circuit held that TAT was arguing that the Congressional authorization under the Copyright Act was “constitutionally excessive” and found this an “unavailing argument.”

**Discriminator:** This Booklover column is not about a Nobel Laureate.

Exploring Nobel literature is an ongoing bucket list process that periodically takes a turn down other literary roads. Four books have recently caught the attention of this book lover: Bruce Chadwick’s I Am Murdered: George Wythe, Thomas Jefferson, and the Killing That Shocked a Nation; Jessica Wapner’s The Philadelphia Chromosome: A Mutant Gene and the Quest to Cure Cancer at the Genetic Level, and the two books by Ta-Nehisi Coates: The Beautiful Struggle and Between the World and Me. History, scientific research, and race relations — welcome to my world.

What makes Nobel literature words different from bestseller words, narrative words, or just the words of a well-told story that you just want to read again and again? This is an unresolved question for me and requires constant pondering — which is okay because the only way to hopefully answer it is to continue reading. Not a bad solution to the problem.

There have already been two passes through Chadwick’s book. Each time I am intrigued. The glorious illustration of the founding fathers and the beginnings of this experiment called democracy is not what you get. You get a piece of history told in three parts and only 240 pages in such a real, gritty and densely rich way that you feel you are walking the streets of either Colonial Williamsburg or Richmond Virginia investigating a murder. Part One of the book is a description of “The Murder.” Part Two details “The Investigation.” Part Three transcribes “The Trail.” George Wythe was one of the country’s founding fathers. He was the first lawyer professor, signed the Declaration of Independence and represented Virginia at the Constitutional Convention. He was held in high esteem in the early community of our nation. Thus it was a shock when Wythe, on his deathbed, accused his young hooligan grandson of poisoning him for his money. Of the many interesting details, nuances of the period and vignettes of day-to-day life in the 1800s, the one that left me really thinking was the reasoning behind the decision of the two lawyers who came to the grandson’s defense.

Politics makes for strange bedfellows. Pick up the book and find out.

From a capsule of our Nation’s history to the historical timeline of a de novo scientific discovery that lead to a drug to manage chronic myelogenous leukemia (also referred to as CML) is not such a stretch. “The First Clue” has the reader “hovering” over a microscope with David Hungerford in 1959 when he realizes that one of the chromosomes, in a sample prepared from a patient with CML, is too short. This short chromosome that Hungerford observed would be known by many names, one of which is “The Philadelphia Chromosome.” Hungerford had a passion for photography as well as science. The new camera-equipped microscope, where he spent his time staring at the black and white squiggles called chromosomes, was located at a cancer center in Philadelphia. Geography was the influence for the name of the aberrant chromosome that is formed by a translocation between chromosome 9 and 22 in patients with CML. With 38 chapters, some of which are entitled “Right Number, Wrong Place,” “Where the Kinase Hangs the Keys,” “Plucking the Low-Hanging Fruit,” “Not Over My Dead Body Will This Compound Go into Man,” “Buzz in the Chat Rooms,” and “A Gleevec for Every Cancer,” Wapner writes in a way to honor the science and appeal to the layman. It is a gift. She excels at it.

Threading the two previous books’ themes to race relations might be a difficult weave, but the crafting of words to explain a perspective is one where Coates’ genius shines. The power in his two books is so great that it leaps from the page. You want to memorize it so you can quote it, because just telling someone what the book is about does it justice. And justice is one of the things that Coates is looking for. His first book The Beautiful Struggle tells his story of growing up in Baltimore. His second book Between the World and Me is written to his son as a guide for what it means to be a black man growing up in America.

I leave you with a piece of Coates’ knowledge from The Beautiful Struggle:

“...The Knowledge was taught from our lives’ beginnings, whether we realized it or not. Street professors presided over invisible corner podiums, and the Knowledge was dispensed. Their faces were smoke and obscured by the tilt of their Kangols. They lectured from sacred texts like Basic Game, Applied Cool, Barbershop 101. Their leather-gloved hands thumbed through chapters, like ‘The Subtle and Misunderstood Art of Dip.’ There was the geometry of cocking a baseball cap, working theories on what jokes to laugh at and exactly how loud; and entire volumes devoted to crossover drible. Bill (Coates’ brother) inhaled the Knowledge and departed in a sheepskin cap and gown. I cut class, slept through lectures, and emerged awkward and wrong. My first day at Lemml (middle school where Coates attended school), I was a monument to unknowledge. I walked to school alone, a severe violation of the natural order of things. ... Everyone moved as though the same song were playing in their heads. It was a song I’d never heard. I shrugged my backpack a little tighter on my shoulder and made my way.

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J on Baumgarten has been one of the country’s most esteemed intellectual property lawyers for decades. I first got to know him nearly 30 years ago when he was counsel to the Association of American Publisher’s (AAP) copyright committee and I was chairman. One of the big issues for the committee in those days was whether AAP would support U.S. adoption of the Berne Convention, the international copyright regime in effect most everywhere else since 1886. Major U.S. publishing, motion picture and other copyright industries had come to view Berne adherence as an important component of American leadership in international copyright affairs and in efforts to counter increasing foreign copyright piracy. At the same time, these U.S. copyright industries were concerned with possible disruptive effects of certain convention guarantees of so-called “moral rights” whereby authors have rights to continued “integrity” of their works, have the right to object to changes made in their works and even to contractually authorize new versions and adaptations of their works, and have the right to withdraw their works after publication. Committee discussions were enlivened by a Time Inc. lawyer’s consternation about whether moral rights would prohibit Time’s practice of cutting writers’ submissions to fit allocated spaces on the magazine’s pages or, more devilishly, to make the words fit the company’s editorial slant.

Jon was acting for a combination of publishing and motion picture companies and other copyright entities plus serving on a small expert committee dealing with the question. He crafted submissions to Congress and developed legislative report language demonstrating the risks of new moral rights protections to copyright industries’ contracts, business models and practices as well as providing assurance that those author interests were adequately protected already by a variety of state laws and required no amendments to the copyright act. These arguments won the day, and many publishers and other copyright entities supported Berne adoption, which passed Congress in 1989. (Time survived, of course, although it’s much slimmer now than it was back then.)

Jon went onto bigger stages for the next 20-plus years until his retirement from active law practice a few years ago. He and his wife Jodi, an accomplished pianist who is a leading light on the local arts scene, live on an island off the Carolina coast, which is heavily populated by birds, deer, alligators, and bobcats. The magnificent beach is 11 miles long, but Jon also enjoys sports played on grass and other non-sand surfaces, such as golf (providing you stay out of the bunkers), tennis, and pickleball, which Jon introduced to the island. (Never heard of it? It’s a turducken of tennis, badminton and ping-pong, played with paddles and plastic balls on indoor and outdoor courts by around two and a half million people in the U.S.) Recently, he’s taken up “sporting clays,” a shotgun sport akin to skeet shooting. As I tell him, he’s clearly making up for all those years sitting indoors while pouring over briefs and law tomes.

Jon’s still invited to address audiences worldwide on the current state of intellectual property law and what judges who are ruling on copyright cases are up to these days. A couple of months ago, he emailed me a copy of a speech on fair use that he gave to a conference in Australia last year. After I read the speech, which I found engrossing, (it’s published in the December 2015 issue of Copyright Reporter – Journal of the Copyright Society of Australia) I thought it would be worthwhile to get Jon’s views on what he sees happening in the copyright arena that he knows so well. Here are my questions and his answers.

You’re living far away from the legal hurly-burly, but you still follow the ups and downs of copyright law. You’d have to say that it’s in your blood, right?

Yes, after almost forty years of law practice, government service, litigation, legislative effort, commercial, policy and technological negotiation, and other activities affecting copyright law, I’d have to say it has left an indelible mark — mostly good — on my psyche. Importantly, it has left wonderful memories, both of issues faced and in many cases resolved, and of many good, smart, ethical, intellectually honest and trustworthy people, both allies and adversaries.

Can you describe some of the issues you refer to?

I was fortunate over my career to have regularly been on the front lines of copyright law’s repeated, tension filled encounters with new and developing technologies. Take photocopying: today it is viewed as a quaint, rather prosaic technology. Beginning in the 60s, however, and continuing for many years, there were very grave and well founded concerns in the publishing community worldwide, in both the commercial and not-for-profit publishing sectors such as university presses and learned societies, particularly in STM, reference and professional, and college publishing, over the impact of unbridled photocopying going on in scholarly institutions and among research-intensive and other commercial businesses. Indeed, photocopying or “re-prography,” more precisely the advent of new and increasingly cheap and widely available copying devices, marked the first dramatic emergence of a number of hallmarks that have continued as prominent characteristics of all copyright law/technology tensions, including those of the digital and Internet eras. These include decentralized copying arising from decisions by large numbers of individuals and organizations to make their own copies and compilations of copies (such as course packs); inexpensive and readily accessible copying outside a pressing facility or other industrial plant; very simple reproduction of extensive portions of copyrighted works and of entire copyrighted works; “private” copying having the cumulative effects of mass copying; the treatment of intermediaries who might be held legally responsible for end user copying (such as libraries and document delivery services and Internet service providers now) or found suitable to facilitate resolution or at least diminishing of tensions (such as the Copyright Clearance Center and other collective licensing “reprographic rights” organizations); and more. In other

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Later I’d understand that the subaudible beat was the Knowledge, that it kept you ready, prepared for anyone to start swinging, to start shooting. Back then, I had no context, no great wall against fear. I felt it but couldn’t say it.”

And a few of Coates’ words to his son about the choice for his name from Between the World and Me:

“The Struggle is in your name, Samori — you were named for Samori Touré, who struggled against French colonizers for the right to his own black body. He died in captivity, but the profits of that struggle and others like it are ours, even when the object of our struggle, as is so often true, escapes our grasp. I learned this living among a people whom I would never have chosen, but the privileges of being black are not always self-evident. We are, as Derrick Bell once wrote, the ‘faces at the bottom of the well.’ But there really is wisdom down here, and that wisdom accounts for much of the good in my life. And my life down here accounts for you.”

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media, the new technology/copyright issues I centrally participated in included off-air and off-cable audio and video taping; unauthorized digital duplication of DVD and Blu Ray format movies and television programs; and the appropriate treatment of both computer programs and semiconductor chips under intellectual property law.

In all these controversies I handled major litigations, Congressional negotiations, and cross-industry attempts at cooperative, voluntary solutions. Several litigations, I am proud to say, established leading precedents that have remained as key legal positions for authors, publishers, motion picture and television companies, and other copyright owners in many different contexts and media. Two intellectually complex litigations I successfully handled for the government while serving as general counsel at the Copyright Office were particularly challenging as they required resolution for contemporary copyright purposes of an issue centuries old and still debated by philosophers: the dividing line, if any, between “art” and “design.” Two non-litigation efforts I spent considerable time with — and emerged from with at least some multi-lateral, cooperative solutions and many lasting friendships even with firm opponents — were legal negotiations on behalf of publishers with the library and educator communities over permissive even if unlicensed photocopying, and integrated legal/business/technology negotiations on behalf of motion picture and television studios with both the computer and consumer electronics industries over the emergent and then hugely successful home video market. Another noteworthy, lengthy and instructive, but thus far not impactful, effort I participated in was one among leading academics, lawyers and other experts from all affected interests or “sides” of the copyright/technology divide to reach a set of common principles.

Were you also involved in the actual drafting of the Copyright Act, and other copyright legislation?

Yes, for many years, beginning in the late 1950s, various copyright owner and user interests had been attempting to revise and update the long-governing, long outdated 1909 Copyright Act. From about 1970 to 1976 I participated in those efforts on behalf of book publishers, songwriters and others. This comprehensive revision effort succeeded in late 1976 and became effective on January 1, 1978. I had been appointed General Counsel of the U.S. Copyright Office, was involved in the final formulation of the new law, and was responsible for the extensive government rulemakings and revision of every Copyright Office regulation and practice that had to be undertaken in consultation with the private sector under the revised act. It was an exhausting yet exhilarating time.

Later I became involved on behalf of publishers, technology companies, and motion picture studios in negotiating several further amendments to the revised copyright act and trade agreement texts governing multinational protection of copyrighted works. These included the expansion of fair use as applied to unpublished manuscripts and the like; United States adherence to the principal treaty governing international copyright (the Berne Convention); the rules governing the recapture of foreign works from the public domain in this country; special protections for architectural works, certain limited edition works of visual art, and semi-conductor chip topographies; standards for protection of American works abroad; prohibitions on circumvention of encryption and other technological protections of copyrighted works, and principles governing the liability of Internet service providers for unauthorized Internet copying and transmission of copyrighted works. (The anti-circumvention and service provider provisions became combined in the well-known Digital Millennium Copyright Act.)

What are some of the major issues that are currently in contention?

Two very prominent ones are these: First, resolving the legal responsibility of Internet service providers and other internet-focused
entities to effectively monitor and meaningfully hinder persistent infringing by uploading, downloading and retransmission of copyrighted works over the Web. This draft has really captured my attention, in the form of at least public speaking and informal consultation here and abroad, notwithstanding my retirement.

In summary, I believe the courts’ Google Books decisions are quite wrong, and more specifically have at least ignored and under mined, if not silently but unduly overruled, major copyright precedents that have held sway to preserve a vibrant and vital copyright system for many years and that are of increased importance today. In other words, I believe these decisions — and a few other case holdings that resemble the errors of the Google Books courts in some though not all respects — have effected fundamental, unwarranted and unwise expansive change in American fair use doctrine. Additionally, I fear the attitude of some who believe that the decision is a “one off,” or sui generis one — that is, one that is effectively limited to the Google Books Project. The lawfulness of that project as “fair use” was sustained at trial and on appeal, but the authors (with support of publishers and other organizations) are currently seeking review of the decision by the Supreme Court.

Other matters of continuing concern and dispute are the legal propriety, and impact of so-called electronic reserves that arguably serve as the digital equivalent of the unauthorized course packs of the photocopying era; the ability to effectively restrain electronic reach of off-shore or foreign piracy sites; and the effect of 11th Amendment providing immunity to state institutions from copyright infringement actions. Additionally, there have been comprehensive roundtables, hearings and reviews and reports in Congress and among agencies with respect to numerous copyright issues in the current and still expanding digital era, though the practical effects of these efforts in terms of legislation and regulation largely remain to be seen.

I should mention that many of these issues are also being voiced, debated and examined abroad. One of particular interest in that arena is the question of whether the so-called “flexible” doctrine of fair use as followed in the United States should replace or supplement the more specifically defined and limited regimes of “fair dealing” and “specific exemptions” that prevail in other countries. In several instances I have expressed considerable concern to foreign audiences as to the wisdom of their governments doing so — especially if American fair use law is understood to now reflect the norm, unduly expansive fair use interpretations and doctrinal changes of the Google Books case and some other quite faulty (in my opinion) decisions.

my direction, to include print collection strategy and digital special collections; and our operational relationship with EdPlus, ASU’s online learning organization. Finally, our colleague Dennis Brunning has agreed to serve as Interim Associate University Librarian for Academic Programs starting on June 1. This position has responsibility for Collections and Scholarly Communication, Archives and Special Collections, and Academic Program Services, subject to the caveat of impending reorganization. Dennis has been Editor-at-Large and a columnist for Against the Grain since 2008, and has been a contributing editor for The Charleston Advisor since 1996. http://www.against-the-grain.com

I am running out of column inches but have to get this last bit in. Another WOW! The awesomely wonderful Steve Oberg (Wheaton College) has been elected Vice President/President-Elect of NASIG for the 2016 election year! Congratulations, Steve! Love to all of you, Yr. Ed.
Since the fall of 2015, I’ve been fortunate to be part of an Andrew W. Mellon Foundation-funded project looking into the possibility of creating a discovery and access platform for university press humanities content. The group, spearheaded by the Association of American University Presses (AAUP), is made up of publishers, librarians, technology gurus, and digital humanists. It’s a marvelously diverse group, each of whom come to the project with different backgrounds and ideas about what end product would be most useful and how it might be structured for greatest usability.

We’ve met in person and by phone a number of times now, and we’re still working to define exactly what this platform could or should be, who it’s for, and how it can be made sustainable over time. Each time I’m tempted to be surprised at the course of the discussions, I remember that these questions are big ones, applicable not only to this yet-to-be-named platform for scholarship. These are also, for the most part, the same big picture issues for publishers and librarians that will define the future of the scholarly ecosystem. Who supports scholarship, its development, discovery, and dissemination? This is the foundational issue that will drive much of our collective work in the decade to come.

Before refining a business model, those charged with developing the shape and scope of the platform have to decide what it should do and who exactly it serves. Certainly, libraries are near the center of this. But we also have to consider the scholar as customer. To do this, we needed more information about how scholars work and what they find themselves needing and wanting in the course of their daily work.

To gain some insight into the potential user base, members of the working group set up interviews with several types of scholars: tenured, non-tenured/early career, adjunct, retired or independent scholars, digital natives and non. We spent several hours on the phone with our subjects, talking through their individual research projects, their work processes, what tools they currently use, their pain points, and their hopes and dreams for how to do their work differently. In my interviews, I was once again reminded that just as libraries differ in their makeup, operation, acquisitions strategy, and a hundred other things, these scholars, too, differ in their situations and needs. As universities rethink tenure and staffing and teaching structures, the scholars publishers serve are an increasingly diverse group.

For my calls, I spoke with two scholars, one an associate professor of history at a medium-sized state university and the other an adjunct (teaching spouse of a tenured professor) in media studies at a large Canadian university. (I still hope to interview a community college professor, as I think this could be a large but sometimes-forgotten demographic within our scholarly community.)

The history professor was focused on a community cookbooks project, and he was constantly seeking new primary materials and information on food in a historical context. In his work, he manages a large quantity of bibliographic data and source materials. He is confident in being able to discover new works and knows what is happening in his field. He’s self-reliant in terms of acquisitions resources; he uses his university library a good deal, but he also told me some years ago (in a different conversation about electronic scholarship) that he regularly buys scholarly books on his own. He does this for the sake of ownership and expediency, rather than waiting for his library to get access to what he needs. He went on to note that individual historians likely have a surprisingly large number of subscriptions to Ancestry.com, simply because the fee is reasonable and these professors would rather access the records on Ancestry.com from the comfort of their home or office as opposed to pouring over microfiche records in a library basement.

This historian is what our group would term the “confident scholar,” someone who knows the pathways to the knowledge he or she needs and who self-creates access solutions. For this type of scholar, the pain point is not the inability to find relevant published scholarship; instead it is the feeling that there are relevant but difficult to discover primary materials out there in special collections. He gave the example of wanting to look for information about food culture in a child’s diary that might be housed as part of a Civil War or other historical collection. Traditional keyword searches would likely not yield results about a couple of diary pages on the deeply granular subtopic of food in daily life. This material is only easily discoverable if you already know specifically what you’re looking for. He wished for something to go beyond traditional subject and keyword searches, something that digs deeper into source content in context.

The second scholar I interviewed differs in many ways. She’d love to have better avenues for finding others working in her field; her research focus is industrial films looking specifically at women and car culture, and it’s a small field. She noted that tenured faculty have a well-defined set of contacts and frameworks, but when you’re working non-tenured, it’s much more difficult to connect with other scholars and to build research and professional networks.

This scholar has always worked across disciplines, and she finds that cross-cultural study is second nature to her. She’s examining vintage car posters, contemporary advertisements, and the items amassed by memorabilia collectors to understand how women are portrayed as a part of car culture. She frequently uses eBay and loves the collectors who categorize things by year, which makes it easier to identify material within the scope of her research. She also accesses a number of online archives to look at African American newspapers (though she’s frustrated by archives where she has to pay for the material before she can scan the content to see if it contains material she actually needs).

In talking about the work she does online, this scholar — somewhat wistfully — harks back to the “old school” process of doing research in physical archives. She recalls that in the process of looking for one thing and reading through a whole African American newspaper, she would come across something else, say a very relevant advertisement in that same edition. These sorts of great “finds” are harder, if not impossible, using a keyword search for a specific item. She laments the fact that with the remarkable access and precision that come with online research, she’s had to give up the delight and benefits of serendipitous discovery.

Even though these two individuals have different profiles and research pathways, I was struck by two great commonalities in their situations and research desires. Special collections hold such great promise for scholarly work, and yet so much of what they contain remains undiscoverable to the online researcher. High-level abstracts and keywords miss much of the rich detail of the materials in these archives, and unless someone knows what they’re looking for, those details often go undiscovered in virtual searches. What technologies could better unlock the full potential of these collections, allowing for a rich exploration experience online?

The other common point, which is more relevant to the work of developing the discovery platform for university press content, is the fact that both scholars talked about the desire for serendipitous discovery. They acknowledged that the physical process of wandering the stacks sometimes yielded wonderful and unexpected information — sources that had in the past shaped the direction and content of their scholarly work. This wandering, the experience of the unanticipated, cannot yet be replicated in electronic searches. Thanks to the work of the bright technical minds at work on the AAUP discovery platform, the hope is that we’ll once again become stack wanderers, this time in the virtual stacks.
The rapidly increasing use of smartphones among young users creates new opportunities for successful library service. Mobile library technology has great potential to improve student and researcher access to academic resources. It is also seen by libraries as a positive way to improve their image and attract the needs of a younger generation of library users who are increasingly engaged with services via mobile devices. However, mobile library technologies have to be implemented in a way that is acceptable to end users in order to encourage usage and therefore be effective. Based on this issue, we conducted a study focused on exploring factors affecting the adoption of mobile library technology. Conducted in UAE, this developing country has a particularly high penetration of smartphone technology.

A qualitative focus group revealed a number of theoretical and practical contributions to the adoption of mobile library technology. Six main themes have been explored to lead to practical implications for both the designers of mobile library applications and for organizations that wish to successfully implement such solutions.

The first theme proposed was the perceived value that the context of mobile libraries involved (perceived usefulness, quality of working life, mobility, relevance and novelty/distinctiveness). Designers need to understand what users will value in a mobile library system and design both the features and implementation to fit these user needs. Users are looking for ways to enhance the quality of their working life. They need to access resources anywhere, anytime. They also require a system that provides unique services that cannot be obtained elsewhere. The availability of RSS feeds and social networks would allow them to integrate services via mobile devices. However, mobile library technologies have to be implemented in a way that is acceptable to end users in order to encourage usage and therefore be effective. Based on this issue, we conducted a study focused on exploring factors affecting the adoption of mobile library technology. Conducted in UAE, this developing country has a particularly high penetration of smartphone technology.

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A qualitative focus group revealed a number of theoretical and practical contributions to the adoption of mobile library technology. Six main themes have been explored to lead to practical implications for both the designers of mobile library applications and for organizations that wish to successfully implement such solutions.

The first theme proposed was the perceived value that the context of mobile libraries involved (perceived usefulness, quality of working life, mobility, relevance and novelty/distinctiveness). Designers need to understand what users will value in a mobile library system and design both the features and implementation to fit these user needs. Users are looking for ways to enhance the quality of their working life. They need to access resources anywhere, anytime. They also require a system that provides unique services that cannot be obtained elsewhere. The availability of RSS feeds and social networks would allow them to integrate services via mobile devices. However, mobile library technologies have to be implemented in a way that is acceptable to end users in order to encourage usage and therefore be effective. Based on this issue, we conducted a study focused on exploring factors affecting the adoption of mobile library technology. Conducted in UAE, this developing country has a particularly high penetration of smartphone technology.
Random Ramblings — Why Don’t Public Librarians Brag More about One of Their Greatest Successes: Providing Pleasure Reading for Their Patrons?

Part Two — Comments from Public Librarians

This column continues the discussion of my contention that public librarians hesitate to brag about one of their most successful services — providing pleasure reading and viewing materials for their patrons. As I say below, I was struck by the fact that the textbook that I used talked mostly about information but said nothing about the importance of pleasure reading. Since my professional experience as a librarian was in three large research libraries, I thought it a good idea to ask public librarians if they agreed or not with me. I do have experience teaching three courses — the introductory course, management, and collection development — where I needed to be aware of and teach public library issues. I also invited guest lecturers from all types of libraries. Finally, I’ve been sequentially married to two librarians whose professional experience included working in public libraries. Nonetheless, some might challenge my credentials to talk about a public library issue and asking public librarians to weigh in could provide additional perspectives.

A good way to begin for those who haven’t read my first column (see Against the Grain, December 2015-January 2016, p.58) is to provide the question that I asked on two discussion lists since it summarizes my main points:

In teaching the introductory library science course at Wayne State for the fourth time, I was struck by the lack of attention paid to recreational reading in the course readings. The stress for all types of libraries, including public libraries, was finding information for users. While I know that recreational reading is technically information, I don’t think that the authors were talking about access to genre fiction. The same was true for the history of the public library with an emphasis upon teaching immigrants how to adapt to American culture. Am I correct in my assumption that even the early public libraries provided fiction that their patrons wanted to read, perhaps even fiction from popular authors with less than high literary status? Finally, my overall impression is that publicity about the value of public libraries tends to focus on things like helping people to find jobs, overcoming the digital divide by providing people with Internet access, support for economic development, etc. I don’t much remember public libraries bragging about providing tons of best sellers and genre fiction to their users though they may brag about circulation in general.

I bring this up in part because I think that support for recreational reading is one of the reasons why the public library will not only survive but flourish. An average family of heavy readers would have trouble paying for the number of books that they wish to read unless they are happy enough with access to the free self-published materials available on many sites or with Project Gutenberg. Even this solution wouldn’t work for acquiring quality materials to read in print before bed to younger children. Such a family can check out a hefty number of books, whether fiction or non-fiction, for their recreational/entertainment value. Many may not even have to use the catalog and other expensive information resources as they head to their familiar shelves, which may now be arranged in book store order.

I’ve always been an academic librarian so I’d appreciate any opinions on my thoughts above…. I plan to treat this topic in my next column for Against the Grain and would like to have a bit more authority in what I say.

I posted the message first on PUBLIB, perhaps the most important discussion list for American public librarians, on June 5, 2015 and received 20 responses. Since I deferred writing this paper until now, I decided to ask public librarians in my home state of Michigan the same question. I did so on March 1, 2016 and received 15 emails. As a convenience sample, the comments below have little statistical reliability. I’ll add that many who responded were professional colleagues that I knew well or former students. I did receive, however, emails from people that I didn’t know. In addition, the respondents most often showed a love of reading that induced them to agree with my arguments. In all, I received only one email with substantive disagreement, and this letter wondered about publishing this piece in ATG rather than a public library focused journal and stated that much of the public would not want to pay taxes to support pleasure reading (Anonymous). Overall, the respondents mostly worked in small to mid-size public libraries, but I received one response from a library science professor.

My first comment concerns the definition of pleasure reading. Upon reflection, my request for comments included too much emphasis upon fiction. John Sheridan reminded me that non-fiction is also important, a fact that I wouldn’t contest because my mother, an avid life-long reader, never read fiction. In a similar way, three librarians (Deborah Battisti, Teresa Natzke, and Jessica Parrij) noted the popularity of DVDs as the visual equivalent of books or focused on the increasing expenditures and publicity for this pleasure viewing format. Finally, Mark Arend added that the “trashy” popular fiction of yesterday may become today’s classics and cited “Fitzgerald, Hemmingway, [and] Twain.”

Suggesting other resources that I could use to develop this topic was another frequent contribution. Two librarians (Julie Marie Frye and anonymous) referred to additional resources on the history of pleasure reading in libraries. The majority talked more about the current situation with suggestions about other publications (Sue Kamm, Kathleen McCook, Steve Norman, and Donald Reynolds), authors (Heidi Butler who suggested the works of David Carr), and Websites (Kathleen McCook).

My next category consists of comments about the popularity of pleasure reading with users. Darwin McGuire pointed to the importance of circulation: “At the Geneseec District Library, in 2015, fiction for all ages accounted for 3/4 of total print circulation.” She went on to add that the circulation of eBooks is growing and “is nearly all recreational reading.” Jessica Parrij provided statistics on the high circulation of adult non-fiction and DVDs at the Rochester Hills Public Library. Finally, Teresa Natzke of the Franklin Public Library believed that “90% of the reading that my patrons do is recreational.”

A surprising number of respondents emphasized readers advisory, including its history (Kirsten Corby), though I didn’t specifically ask about this aspect of pleasure reading. Several librarians contrasted this skill with the more technological and information science aspects of public library work. For me, the most telling account dealt with the retirement of a paraprofessional whose “technical skills were not the best” but who occasioned “a call from a patron who was extremely upset that we would let this person go and demanded that I come up with some way to make her stay.” (Elyse Streit) For Betsy Sherednik, “when libraries get sidetracked with maker spaces and goals to be techno geeks, it’s so sad…. I say let’s embrace what we are good at — getting the right book into the hand of the one who wants it.” Emily Izidor worried about librarians who don’t read because patrons “want to hear from professionals telling them what they personally enjoyed or personally read.” She then added that some people use fiction to “get through the death” of a loved one, which supports the importance of bibliotherapy.

continued on page 58
An anonymous librarian had a perceptive observation about the differing importance of pleasure reading for children and adults. “Early literacy programs are important and, to get children excited about reading, programs are created to get kids reading for pleasure; however, once we pass the threshold into adulthood, the joy of reading is no longer a large concern.” She listed some programs to encourage adult reading, but they lack the educational focus of those for children such as Battle of the Books (Faye Van Ravenswaay).

Only two librarians commented on the Pew Report, Libraries at the Crossroads, whose summary report about what Americans wanted from their public libraries did not include pleasure reading. (I quoted from this report in my first article.) Cynthia Bierniek replied that it included the statistic that “78% believe that libraries are effective at promoting literacy and the love of reading” though I will once again point out that at a certain point pleasure reading may not significantly enhance literacy for adults. A librarian who wishes to remain anonymous observed that “the Pew study reflects a more ‘high-minded’ view of what libraries should be doing. So it seems it’s not just librarians who aren’t bragging about pleasure reading, the study participants don’t seem to be doing that either.” The person also said that both librarians and the public may be taking pleasure reading for granted.

One of my key points was the fact that public libraries don’t take credit for their huge success and popularity in making pleasure reading available, one of the surest guarantees of their continued existence. Four librarians gave the following reasons for this. Megan Buck made three points: “I think voters are more likely to vote for a millage if they believe the library is providing opportunities for education and self-improvement that are not available (even for a fee) somewhere in the community.” The second is that grant funders “don’t care about how popular your library is; they want to know what ‘good deeds’ your library is doing and providing for the community.” Finally, “I think that people want to know that their tax dollars are going to contribute to the greater good — an overall improvement in society — an increase in education, safer environment for their children, or an overall equalization of the population.” Cynthia Orr expressed a similar concern that “public libraries over the years have been afraid to brag about providing best sellers and genre fiction because they felt vulnerable to critics who would call that ‘trash’ or even ‘porn’ and possibly go after funding.” A third anonymous librarian is even more blunt: “Your article is going to claim librarians should try to convince local governments to support public libraries to provide little old ladies with Harlequin romances and old men with Westerns. The only recreation Americans are willing to support with tax money is sports.” Amy Alocensius provided a different reason. “Maybe we don’t brag or advertise about how we fulfill the need for pleasure reading because the readers in the community are already users and don’t need any more convincing.”

On the other hand, I concur with the more nuanced viewpoint from Carlie Hoffman. “I also think that the publicity has to do with the audience. When public libraries are publicizing to other libraries or to government and other funding entities, they tend to focus on being good stewards of tax dollars, economic impacts, and bridging the digital divide. When public libraries are publicizing to the general community, they focus more on recreational reading (and viewing and listening)...” Darwin McGuire confirmed this opinion when she said much the same thing: “We tailor our message to the audience. In our millage..., we will be emphasizing the popular services...” The decision to choose the message appropriate for the intended audience is one of the secrets of successful communication, especially in this case when both messages are accurate.

I will end with a few comments on the fact that the success of the library depends upon providing pleasure reading. Deborah Battisti said this well. “Folks who want information use us once or occasionally. Folks who want to read for recreation use us regularly; and it’s because... they save money getting books at the library.” While several librarians said the library should give patrons what they want, Kimberly Schaaf said it best: “The main idea here is that if a patron walks away from the library unsatisfied because we didn’t have that best seller or movie, then they probably won’t come back. If they don’t come back, then where do we stand when the millage expires?”

To conclude, I wish to thank all those who responded to my request for comments. The librarians above provide additional insights on pleasure reading and mostly support my contention that pleasure reading is an important but often overlooked key function of public libraries. While providing pleasure reading may not be as “trendy” as 3D printing or maker spaces, it makes economic sense for the community and will play a critical role in assuring the continued existence of public libraries. 🏮
Pelikan’s Antidisambiguation
from page 58

purpose-built typeface for e-readers. My own exposure to, and reaction to, Amazon’s previous attempts at typeface selection was confined to my own annoyance, not really caring for any of the fonts available on the Kindle. When they offered the new typeface, Bookerly, I took one glance at it, and thought, “Hmmm! Much better!” Even though I couldn’t articulate why it looked better, I switched over, and haven’t gone back, except to prove to myself that my selection decision rested upon something more substantial than simple newness.

Not surprisingly, the release of Bookerly generated quite a bit of buzz in the typeface-aware corners of the Blogosphere (where they have corners for everything). Overall, the comments have been largely positive, although this may speak, simply, to how miserable the face-aware corners of the Blogosphere (where generated quite a bit of buzz in the type

One of the commentaries included a reference to a post on fastcodesign.com. The object of the mention was a study conducted by Errol Morris on the effect typography has upon the reader’s perception of truth. Here’s the link: http://www.fastcodesign.com/3046365/errol-morris-how-typography-shapes-our-perception-of-truth.

If it seems surprising that the choice of typeface might influence the perceived credibility of a body of text, it’s worth remembering that we’ve long known the counterpoint to be true: you can make the most lucid, sober statement appear ridiculous by dressing it up in a clownish font. This recalls the early days of laser printers and soft fonts, when serious columnists solemnly advised folks to take it easy: please use the fonts already, saying, “You don’t want it to look like a ransom note!” And they were right.

What all manners of human expression might have in common is the effort and care that can go into the design of capture and preparation for conveyance of ideas. Packing something important for a trip merits some care and thoughtfulness. I’ve voiced suspicions about this here before. To a blindfolded observer sitting in the studio, a small music ensemble recording session of today would sound very much like one that may have occurred a century earlier. Most telling would be those moments immediately before and following the musical piece itself: the moment of silence and concentration preceding the first measure, the moment of suspended relief and reaction immediately following the close. Then someone says, “Let’s listen to it!” This is entirely independent of the technology, and, I think, perhaps, approaches universality, and perhaps is unchanging.

This impression is bolstered by work presented at http://firstsounds.org. These are people who’ve applied 21st-century technology to surviving examples of 19th-century attempts at capture sound, such as those in 1860 by Edouard-Leon Scott de Martinville in Paris. In work pre-dating Bell, he devised a mechanism to produce a visual representation of sound waves. The wizards associated with firstsounds.org, David Giovannoni, Patrick Feaster, Richard Martin, and Meagan Hennessy, figured out a way to take surviving artifacts produced in those early experiments, recover the waveforms stored in them, and render them as sound, making it possible to hear what may very well be the earliest existing examples of recordings of the human voice. Included at the end of one of the clips is what appears to be a spoken epithet, produced in disgust at the end of what might be history’s first botched take, captured for all eternity. Universal, indeed.

There are similar examples in other areas, durable practices that have survived the evolution of their host technology’s evolution over time. The act of sitting for a portrait, is unchanged in many respects, from paint to still photography, except, perhaps, for the welcome departure of the head clamps that were employed in early photographic portraiture owing to the slow emulsions and long exposure times of that era. Another universal quality is that of directionality: most things have a front end or front side, they “point” in a particular direction and orient themselves in that direction as they move. Most conveyance requires at least one party to be “watching where they’re going,” indeed, we pay the driver to do that — it’s a selling point, “Leave the driving to us!”

Consider the editing process connected with the published word. Somebody, usually one who demonstrates an aptitude, if not an eagerness, reads the text for errors. This protects the end-reader from having to be the first one ever to have read the thing (although I’ve spoken with many professors who feel they’ve frequently been the first even to glance at the “finished” works they receive).

And here we arrive at one of the promises of e-text, long potential, and now made actual. If you have a Kindle, have you ever noticed the appearance in your “library” of a work you know to have been part of the library for some time, yet here, displayed as recent, even bearing the label, “New”? What’s that about?

Well, in looking into the Bookerly release, one of the things you find is that along with the typeface, Amazon has also introduced a new page layout engine to render it. The new page layout engine comes as a software update. Among other things, it has done away with the old engine’s obsession with achieving full line justification by inserting spaces between words to pad out the length of a line. The result often just looked weird, and was a matter of annoyance and complaint among those who notice and comment on such things. Ah, but to take full advantage of the new page rendering algorithms, it has been necessary to re-encode the e-texts, presumably adding tags needed to direct the enhanced rendering process. This means that works in your “library” that have

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Reported by: Anthony Watkinson (Consultant) <Anthony.watkinson@btinternet.com>

APE is a distinctively European meeting now in year 11. Arnoud deKemp (once of Springer) is the highly-visible organiser and overall chair. It is his home ground and the location in and around the beautiful Gendarmenmarkt in Berlin Mitte is chosen carefully to showcase the city. The word “distinctively” is used because the origin of the event relates to the need felt by some senior Continental European publishers for a counterbalance to the increasingly Anglo-American dominance of STM publishing. There is now no overt rivalry between APE and the big STM meetings and indeed STM are major sponsors. At the start of the series there were more librarians among registrants and more smaller German publishers, both university presses and mainly German language commercial houses, than there are now and also more presentations on books: it made for a different mix. Now the agenda is essentially an international STM one but yet different because the big themes are different in Europe particularly in relation to the open agenda and especially open access and its progress.

The number attending is always limited to about 200 because of the capacity of the splendid Leibnitz Hall of the Berlin-Brandenburg Academy of Sciences and Humanities and, as usual, there was a waiting list. The whole of the main conference was videoed and the video can be found at http://river-valley.zeeva.tv/conferences/ape-2016. The main conference site is at http://www.ape2016.eu/index.html. There was a pre-conference on 18 January with a different attendance (about 80) and organisation, which was not videoed.

For this report I am picking out a number of the main themes expressed in the sessions. These are transformation of the scholarly communication system, flipping the subscription model for journals to an open access one, open science, and principles of sharing at the higher policy level, and secondly a number of presentations on the mechanics of change including such topics as friction in the workflow, reputation mechanisms, and “digital plumbing.” Then there were funders. There was a final panel on publication ethics.

The pre-conference concentrated on the way that the digital revolution has impacted on the publishing business. Digital publishers need a different skillset than they did ten years ago. The organiser wrote: “The days of lifelong employability are behind us, and in order to make a living and add value to scholarly communication we, as people working in the industry, have to adapt.” Librarians will share these sentiments from a library viewpoint. The speakers talked about so-called millennials. They do not want to be tied down to long-term employment and regular hours. They want a flatter hierarchy. Publishers want flexibility and new skills but I am not sure that the two needs (as described) actually match. One contributor challenged assumptions about millennials who are now early career researchers — a new research project is actually asking them about their attitudes — see http://www.ciber-research.eu/harbingers.html.

The main conference started with another assumption. In the EU the concept of open science is espoused by the eurocracy. The speaker Barend Mons is one of their evangelists. He runs the European Open Science Cloud. Researchers should make all research objects available to machine mining or they are not serving science is a controversial view among most researchers but it was argued for with some panache and at a level of detail which is impossible to reproduce — see the video. There are also those who adhere to the view that all journals must be open access. The problem for existing journals is the economics of flipping. Ralf Schimmer of the Max Planck Digital Library explained how, according to his calculations, flipping from a subscription model to an open access model need not involve extra costs. The most recent exposition of his ideas is in a publication repository — http://pubman.mpdl.mpg.de/pubman/faces/viewItemOverviewPage.jsf?itemld=escidoc:2148961. Schimmer hopes that governments will become more active in enforcing transformation. Europeans are keen on enforcement — for a U.S. program on this topic emphasising encouragement see https://osc.hul.harvard.edu/programs/journal-flipping/.

Is “sharing” at the heart of transformation? There was an important panel at the beginning of the second day of the full conference. A number of questions were raised by Richard Padley the moderator. Fifteen million documents are being uploaded on scholarly collaboration networks (SCNs) and they are growing. Research Gate is now the best known. Are they legal — probably not? Do they add value to the system? They might well do so. The panel was headed by Fred Dylla former CEO of the American Institute of Physics and now running a consultative exercise on possible principles in this new area for the STM publishers. See http://www.stm-assoc.org/ stm-consultations/scn-consultation-2013/. He was judicious. Other panelists played with radical ideas. Will SCNs bypass publishers or become publishers? Should we flip the model and give researchers what they want? These were two contributions from Charlie Rapple of Kudos. Watch this space.

The first presentation on mechanisms of communication, on how to minimise friction, has come from John Sack, a founder of HighWire, the previous day. It was a tour de force available on the company blog. The friction involved was in the researcher workflow. He covered manuscript submission, peer review, the form of the article, referencing and linking, and indexing. A lot of the analysis was of publisher failure but a common recipe for improvement was for publishers to get together on best practice. In some cases, but not many, such as peer review there is progress in an area where each journal used to have its own practices requiring rewrites each time a paper is submitted. Professor Dave Nicholas of CIBER Research summarised his EU study on measuring scholarly reputation in the digital age. This is available at http://ciber-research.eu/download/20160120-reputation_berlin.pdf. Publications are no longer the only standard for judgement. He is particularly interested in teaching metrics — an almost invisible area at the moment. There was a lucid presentation on first year of the German Council for Scientific Infrastructures which advises on digital shift. Funding tends to be for projects. It is difficult to get funding for digital plumbing, seemingly a new word for cyberinfrastructure and rather more pleasing.

Many readers will know that funders have a bigger role in Europe than they have in the U.S. particularly where open access is concerned. Science Europe is the organisation of governmental funders (74 in all) and was represented by their policy director. They adopted principles on OA publishing services in 2015. There are a range of documents on this site — http://www.scienceeurope.org/downloads — many of which look interesting. Perhaps 80% of members have a policy of funding OA mainly green but increasingly (also) gold. They understand that they need to interact with researchers, which is a pleasant surprise.

Finally there was a big panel on research ethics and publishing. There was general agreement that most bad behaviour is a matter of sloppiness rather than deliberate dishonesty, that publishers they had had the answer — for example a spreading of the preprint culture. Most were not certain how best to act. Editors are for example under some obligation to defend their authors. It was a debate held within biomedicine. A physicist from the floor pointed out that you do not get retractions in his subject.
Columns Editor’s Note: Thank you to all of the Charleston Conference attendees who agreed to write short reports that highlight sessions they attended at the 2015 Charleston Conference. All attempts were made to provide a broad coverage of sessions, and notes are included in the reports to reflect known changes in the conference titles or presenters, highlighting those that were not printed in the conference’s final program (though some may have been reflected in the online program). Please visit the Conference Website at www.charlestonlibraryconference.com, and https://2015charlestonconference.sched.org/, for the online conference schedule from which there are links to many presentations’ PowerPoint slides and handouts, plenary session videos, and conference reports by the 2015 Charleston Conference blogger, Don Hawkins. The conference blog is available at: http://www.against-the-grain.com/category/chsconfblog/. The 2015 Charleston Conference Proceedings will be published in partnership with Purdue University Press in 2016.

In this issue of ATG you will find the second installment of 2015 conference reports. The first installment can be found in ATG v.28#1, February 2016. We will continue to publish all of the reports received in upcoming print issues throughout the year. — RKK

THURSDAY, NOVEMBER 5, 2015

Almetrics in Practice: How Institutions are Using Almetric Data to Enhance Administrator, End-User and Staff Assessment Practices — Presented by Sara Rouhi (Altmetric); Andrew White (Stony Brook University); Colleen Willis (National Academy of Science)

Reported by: Ramune K. Kubilius (Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

The session covered a lot of ground. Rouhi tackled the question, “What are almetrics?” by covering basics. They are 1) Indicators that are complementary to traditional metrics; 2) immediacy indicators (for some, the article is not the currency of communication); 3) garnering of attention in a multi-faceted picture of engagement. Almetrics do NOT indicate how often people are finding your site and what they are doing there, nor do they gauge efficacy. Ways to track output provide a vehicle with tags attached to output and are in a source that is track. As an institutional tool, aggregates, visualizes by the deep dive, and uses of the API, provide data that is integrated and visualized. White described a range of applications and uses of almetrics: use for faculty (VIVO) scorecards, tracking media coverage and global reach. Advice? Focus on DOIs, develop an “elevator” altmetrics speech, recognize that disambiguation is still a challenge. Willis described motivational metrics, using data to communicate impact. That can include Impact Lib-Guides, impact summaries (for which she fields many requests), and librarians’ use of the tools to package the information. Next steps: more staff training, embedding librarians into communications planning for projects, improving analytics techniques of usage, peer review metrics and analytics. During discussion with the audience, it was acknowledged that almetrics, as with other numbers (and statistics), can be gamed, but their potential and actual use is undeniable for communications, collection development, grant compliance, and broad impact statements. Funders are using almetrics, too. Who pays? It may differ — the communications office at one institution, the vice president for research at another.

Implementing Collection Lifecycle Management — Presented by Annie Bélanger (University of Waterloo Library)

Reported by: Jennifer Abbott (National Renewable Energy Laboratory Library) <Jennifer.Abbott@nrel.gov>

Bélanger urges librarians to think differently about collection development. All too often we focus on the acquisition of materials and pay very little attention to what happens throughout the lifespan of those items we acquire. By shifting to a holistic view of collection development or collection management, we can improve our practices by instilling a feeling of empowerment towards our collections. We can develop a manageable collection by taking a strategic retention focus and only keep those items that are valuable to us instead of all items deemed valuable.

In a session that was standing room only, Bélanger outlined a few guidelines for developing a collection lifecycle management plan. One involves keeping an open and consistent line of communication with stakeholders and other participants to gain buy-in. Another involves developing both a collection development policy and an overarching strategy and to be sure to follow them. Additional guidelines can be found in Annie’s toolkit: http://subjectguides.uwaterloo.ca/collectionlifecyclemanagement.

By adapting this approach to collection development, the University of Waterloo Library was able to transform its costly 98 percent capacity collection to a much more manageable 81 percent capacity collection.

Interrogating Demand: Pathways toward purchase in patron influenced E-book models — Presented by Harold Colson (UC San Diego); Jim Dooley (University of California, Merced); Kerry Scott (UC Santa Cruz); Deborah Kegel (UC, San Diego)

Reported by: Amy Lewontin (Northeastern University) <a.lewontin@neu.edu>

One of the interesting moments in a very upbeat session occurred when Dooley, from one of the newer University of California campuses, Merced, discussed the goals for the “shared” collections with which the UC system was experimenting. He stressed the idea of improving efficiencies and raised the notion of “what does sharing look like in an eBook world?” He mentioned taking a philosophical approach to Demand Drive Acquisitions. The University of California’s first pilot involved 32 institutions and was a split between ebrary and EBSCO, and MyiLibrary for eBooks, shared among all the participating libraries. Scott, from UC Santa Cruz, discussed the UC pilot between ebrary and Yankee Book Publishing (YBP).

Scott made mention of something that many libraries may be thinking of, but may not have enunciated yet, and that is an: “eBook values statement” which the UC libraries developed for themselves. Sort of a hopes and dreams and value and what parameters would a library want to see in an eBook license. Certainly it appeared that the UC system, based on the meeting, was not looking for strong DRM in their eBooks, but this was one of the negatives they found during the pilot. Other negatives worth noting — ADA

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And They Were There
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issues; ILL chapter level only; not an unlimited # of users; platform not loved (by librarians); STL embargoes and STL fee increases. They were looking to expand the depth and breadth of their collection, and they did appear to find that happening with the pilot approach. What Scott mentioned that libraries may want to take note of, is that they were able to support university presses through the DDA program, and also to improve access for their users, and this they could see through their usage data. Kegel spoke about a publisher specific eBook platform, and that was Engnetbase from CRC. Her feeling was that she would rather see the Library purchase books from publisher sites directly, through an evidenced based model. It may be time consuming for the Library staff, but it is worth the time, to do the analysis.

Colson discussed the pilot approach for JSTOR eBooks. As it was put to the members of the audience, “JSTOR drives.” What was different about the approach was a specific choice not to load MARC records but instead make use of their discovery tool as a database for their records. JSTOR chapter downloads were amazingly popular and it was interesting to see the titles used, and the reasonable cost for a book purchase. Many of us need to be thinking about a library eBook value statement, as a possible guiding principle, and the meeting was an opportunity to share materials and secure work that may otherwise be lost. A grant was received for funding graduate students to aid in the various steps of the project. The first graduate student who worked on the project, Crissinger, also contributed to the presentation via Skype. The presenters discussed the need for the preservation and sharing of library reports within an institution and with other libraries. McCollough advised on the importance of having different outlets for publishing library reports versus publishing scholarly works through a university press. Hinchliffe presented information on the Library Occasional Report Series (LiboRS) project that was established at the University of Illinois at Urbana-Champaign. LiboRS was created as an opportunity to share materials and secure work that may otherwise be lost. A grant was received for funding graduate students to aid in the various steps of the project. The first graduate student who worked on the project, Crissinger, also contributed to the presentation via Skype. She discussed the early stages of the project and how materials are selected for inclusion to LiboRS. Hardesty discussed the need for creating a visually appealing template and how the project will be publicized through blogs and social media. Hinchliffe concluded the session by discussing the future of the project and the anticipation of the university’s first publications. The session proceeded as advertised, and the presentation continued on page 63.

Will it Ever Settle Down? The Impact of the Rapidly Shifting Ebook Business Models on Libraries and Publishers — Presented by David Givens (Loyola University); Rebecca Seger (Oxford University Press); Lynn Wiley (University of Illinois at Urbana-Champaign); Michael Zeoli (YBP Library Services)

Reported by: Jennifer Culley (The University of Southern Mississippi) <Jennifer.culley@usm.edu>

Presented in a panel format to a large crowd, with standing room only, it appeared to be the answer to “Will it ever settle down?” is not right now. Each presenter spoke about their experiences with eBooks including challenges with acquiring them, using them, maintaining them and purchasing them, eliciting many nods of agreement from the audience.

Currently, there are many ways of acquiring electronic books, such as: purchasing entire collections, subject specific or archival collections, via a database model, title-by-title, subscriptions or lease, aggregator third party, PDA (Patron Driven Acquisitions) or DDA (Demand Driven Acquisitions), and EBA (Evidence Based Acquisitions).

Some issues concerning eBooks include ownership, what is not included, licensing and procurement, access fees, price hikes, user options, number of simultaneous users, printing and download options, getting use statistics, platform proliferations, readers and vocabulary, discoverability, course adoption and adding e-copies. All of these issues must be addressed, especially within the landscape of shrinking library budgets.

eBook numbers are growing, as is the use of them. Publishers are making numerous changes to keep up with the market, shrinking library budgets and demand. Packages and model options are changing and libraries are forced to adapt. This looks at the moment to be an ongoing issue, to which all libraries will continue to face in the immediate future.

THURSDAY, NOVEMBER 5, 2015
CONCURRENT SESSIONS 2

Life Post-ILS Migration: How Far Have We Come Since Our “Go Live” Dates and Where Do We Go From Here? — Presented by Susan Flanagan (Getty Research Institute); Moon Kim (California State University, Fullerton); Ann Kutulas (Tarrant County College)

Reported by: Gail Julian (Clemson University) <djulian@clemson.edu>

Three librarians from institutions in various stages of migration to Ex Libris’ Alma shared their experiences with an engaged audience. The Getty Research Institute in California migrated from Voyager to Alma and uses Primo as their discovery layer. Getty was an early adopter of Alma and took a long time to implement. Tarrant County College in Texas is located on five campuses served by one technical services department. Tarrant migrated in only four months and experienced a steep learning curve. California State University, Fullerton is one of 23 campuses that are in the planning stages of a group migration to Alma in 2017. While cost was an important factor in the selection of Alma, postponing implementation until 2017 will allow for data cleanup and for Alma to mature. Three of the CSU campuses are currently testing and developing best practices for the group. The discussion yielded continued on page 63

Against the Grain / April 2016 <http://www.against-the-grain.com>
several important takeaways: a shorter timeframe for implementation may be preferable over a longer one; Alma is expected to mature over the next year or two if a migration can wait; Ex Libris provides weekly calls during migration and quick follow-up thereafter addressing concerns about system support; notes fields may not migrate well; Alma has strong workflow tools but don’t expect current workflow to transfer to Alma; some workflow improvements resulted but features in previous systems might not be present in Alma such as the ability to interact with storage without intermediate software such as GFA; Alma upgrades monthly with fixes to that upgrade coming in the next week or so. This can cause confusion for staff who may be used to only Voyager which is more compartmentalized; Alma has no predictive income. Emphasize access and support from the budget. It turns out that librarians and vendor representatives can work together to reach out to faculty. Arthur and McCall were panelists and Schulman played the role of moderator and panelist. An audience member said they were successful with meeting faculty for drinks. McCall agreed. Someone else in the audience suggested wine and cheese events with faculty. ROI is a major focus as is more collaboration.
laboration, particularly across departments. One idea is setting material funds aside for new faculty in addition to their usual departmental funds.

It was interesting to hear about collaborations between librarians and vendors reaching out to faculty and students, however, the sales pitch information detracted from what I think we could have learned in this session.

THURSDAY, NOVEMBER 5, 2015
AFTERNOON NEAPOLITAN SESSIONS

Innovations in Open Access Monographs, Archives and Journals — Presented by Rick Anderson (University of Utah); Brian Hole (Ubiquity Press); David Parker (Alexander Street); Alison Mudditt (University of California Press); Jack Montgomery (Facilitator, Western Kentucky University)

Reported by: Crystal Hampson (University of Saskatchewan) <crystal.hampson@usask.ca>

Mudditt opened this inspiring session on alternative models of OA publishing by describing the context for monographs publishing where the transition to open access is happening at the same time as the transition to digital Open access fits UC Press’ mission to democratize content and disseminate scholarship. However, OA models for STM journals (disciplines with large research grants) do not fit the humanities reality. Mudditt described UC Press’ Luminos model for OA book publishing. Contributions are made from the author’s institution, a subsidy from its library, a subsidy from UC Press and revenue from print sales. Authors want to be read, not just published. UC Press hopes to demonstrate that OA can be better than traditional monographs. Hole described the Open Library of Humanities platform, a very cost efficient platform supported as a charitable organization, publishing without article processing charges for authors. OLH hopes to create a global community of humanities publishing. Publishing can be cheaper. Parker described archival OA publishing using two models: government or institution funded, and the sales threshold model which has delayed OA. An example is Anthropology Commons, which has delayed OA, 10% of sales contributed to sponsor future OA publishing, and underwriting by some contributors.

Shared Print in the Orbis Cascade Alliance and Colorado Alliance — Presented by Charles Watkinson (Facilitator, University of Michigan); Xen Arch (Reed College); James Bunnelle (Lewis & Clark College); Jill Emery (Portland State University); Yem Fong (University of Colorado Boulder Libraries); Michael Levine-Clark (University of Denver); George Machovec (Colorado Alliance of Research Libraries)

Report by: Alison M. Armstrong (Radford University) <ammastro@radford.edu>

The Orbis Cascade Alliance presenters were Arch, Bunnelle, and Emery. Their top priorities are cooperative collection development, pooling resources, and space reclamation. There was a collective purchase of 1,000 volumes of 19th Century British Parliamentary Papers they wanted to weed. Several lessons were learned: print documentation is never complete and always have an exit strategy. They made a joint purchase of the e-version. The next step is to decide who, if any of them, will keep the print.

The Colorado Alliance of Research Libraries presenters were Fong, Levine-Clark, and Machovec. The impetus for their shared print program was based on space, a strong ILL system, eBooks, and storage facilities. They have designated copies to hold and others to weed to protect last copies. Their comparison tool, Gold Rush, can use real time data to compare library to library or system to system. It can also be used for new programs for list checking and gap filling and to support requests for additional funds.

PASCAL, is high-density offsite storage. The materials that are there are there to stay and have been identified as last copies.

The session was informative, engaging, and well attended.

Text & Data Mining Contracts – The Issues & The Needs — Presented by: Meg White (Facilitator, Rittenhouse Book Distributors); Nancy Herther (Moderator, University of Minnesota); Alicia Wise (Elsevier); Daniel Dollar (Yale University Library); Darby Orcutt (North Carolina State University Libraries)

Reported by: Ramune K. Kubilius (Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

Reference was made to an Elsevier video, “What is Text Mining?,” (bit.ly/1R18CIU), and the LIBER text and mining Website (http://liber.eu/text-data-mining). Dollar jump-started the presentation with a reminder that the purpose of scholarship is to understand a large corpus of information and that challenges include legal (licensing), pricing, and access issues. The inability to mine is a type of embargo (restriction) on using content. Library support is needed especially for the humanities (more than STM). Digital Humanities Centers can bridge gaps on making raw data interoperable for humanists. Per Wise, libraries and publishers work together to support researchers. She highlighted Elsevier’s aims to provide services beyond content (e.g., its SDM development portal) and a timeline in this arena since 2006. Researcher challenges abound in differing support requirements by discipline and expertise (early adopters needed to write their own code), legal (e.g., user privacy), and financial. Orcutt mentioned his institution’s mining colloquium and mentioned vendor and library push me/pull me challenges and misunderstandings on capacities, siloed content, librarians’ expectations (a lot at no additional cost) vs vendors’ thinking (that everyone needs customized service). “Mining” implies new support and new roles. The first step is to advocate for basic access (BAM- the Basic Access Model). Questions to panelists abounded and responses highlighted the spectrum of users and their needs: those who just need the data, those with an interest in getting into mining, and those who need hands holding. One (identical?) hope expressed: vendors should consider price at scale with support for users at all levels (i.e., high-end researchers don’t need dumbed down systems for mining).

That’s all the reports we have room for in this issue. Watch for more reports from the 2015 Charleston Conference in upcoming issues of Against the Grain. Presentation material (PowerPoint slides, handouts) and taped session links from many of the 2015 sessions are available online. Visit the Conference Website at www.charlestonlibraryconference.com. — KS

Pelikan’s Antidisambiguation from page 59

The Orleans Cascade Alliance presenters were Arch, Bunnelle, and Emery. Their top priorities are cooperative collection development, pooling resources, and space reclamation. There was a collective purchase of 1,000 volumes of 19th Century British Parliamentary Papers they wanted to weed. Several lessons were learned: print documentation is never complete and always have an exit strategy. They made a joint purchase of the e-version. The next step is to decide who, if any of them, will keep the print.

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The session was informative, engaging, and well attended.
S
pring has sprung here in South Carolina! The azaleas are in full bloom, the weather is getting warmer, cars and porches are covered in yellow pollen, and everyone (at least everyone without pollen allergies) is eager to get outside and soak up some sunshine.

We are excited to announce that the 2016 Call for Papers is now open! Do you have ideas, challenges, solutions, or information to share? We’re seeking proposals on topics related to collection development and acquisitions, including, but not limited to: analysis and assessment, budgeting, discovery, digital scholarship, end users/use statistics, management/leadership, library entrepreneurship, professional development, scholarly communication, and technology and trends. The proposal deadline is Friday, July 15. The Charleston Conference wishes to provide opportunities for everyone to be heard. We encourage proposals that include representation from the different viewpoints and stakeholders in the scholarly communications process, so please consider the diversity of your panel. Also, please note that conference sessions are meant for librarians, publishers, and vendors to discuss issues of interest to them all. They are not an opportunity for marketing products or services.

We have several ideas percolating and tentative plenary speakers in the works! Rumor has it that R. David Lankes will be making an appearance in Charleston following his appointment as director and associate dean in the College of Information and Communications at University of South Carolina’s School of Library and Information Science. We’ve also been in conversation with Kalev Leetaru, Senior Fellow, Center for Cyber & Homeland Security, George Washington University, Google Developer Expert, Google Cloud Platform, and Featured Voice / Columnist, Foreign Policy Magazine, and we’re excited to see his vision for a talk in Charleston. The conference directors have approached Gary Price, of InfoDOCKET, following his presentation with the Long Arm of the Law panel last year, to head up a program that would take the current pulse of the industry and focus on the key, cutting edge issues, trends, and initiatives that are poised to have major consequences and require the profession’s attention. Another contribution from Ann Okerson, Senior Advisor on Electronic Strategies for the Center for Research Libraries, is a “Shark Tank-like” session for entrepreneurs and start-up ideas. I’ll be sure to keep everyone posted as these and other plenary sessions develop in the coming months.

Do you “like” the Charleston Conference? Have you “liked” us on Facebook or followed us on Twitter? Lately, we have made it a priority to be more transparent and communicate more frequently both through social media, email, and here in this column. So, if you haven’t already, check us out on Facebook or Twitter to keep up to date with all our announcements, news, local Charleston info, and more.

Videos of all of the 2015 Plenary and Neapolitan sessions, plus eight wonderfully awesome “Views from the Penthouse Suite” interviews from Against the Grain, are available on the Conference’s YouTube channel (http://www.youtube.com/user/charlestonconference) and on the Conference Website (http://www.charlestonlibraryconference.com/video/). If you weren’t able to frantically make notes on all of the great ideas, quotes, and data that were shared on site, you can now review these talks at your leisure.

Registration for the 2016 Charleston Conference will officially open on Monday, June 6. If you have a situation requiring you to spend fiscal year-end funds prior to this time, please contact Sharna Williams, our Conference Registrar, at <sharna@charlestonlibraryconference.com>.

We would be happy to work with you on an early registration option.

Charleston Vendor Showcase

Around the same time that registration opens, contracts and information for the 2016 Charleston Vendor Showcase will be made available by email. The brilliant and always on-point Toni Nix manages the Showcase, so if you aren’t already on her contact list you need to get in there now so you don’t miss out! Email her at <justwrite@lowcountry.com>. Spaces are sold on a first come, first served basis, and they always sell out super quickly! The Showcase will be held this year on Wednesday, November 2, from 10:30 am - 6:00 pm in the Francis Marion Hotel. See http://www.charlestonlibraryconference.com/confERENCE-info/events/vendor-showcase/ for a list of 2015 exhibitors, a showcase map, and more information.

Last, but not least, the Call for Preconferences prior to the main conference is up and will close short-ly. We’ve already got some fantastic proposals for these preconferences, sessions on linked data, legal issues in libraries, understanding the library market, data curation, and more.

Charleston Comings and Goings: News and Announcements for the Charleston Library Conference

by Leah Hinds (Assistant Conference Director) <leah@charlestonlibraryconference.com>

Kalev Leetaru

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Kalev Leetaru

Ann Okerson

R. David Lankes

Megan Kilb

Kalev Leetaru

Megan Kilb and Rebecca Vargha, UNC Chapel Hill, will be leading the Acquisitions Bootcamp preconference. 2016 Preconferences will be held Monday, October 31 through Wednesday, November 2. If you have an idea for a preconference workshop, please use the proposal form on the Conference Website or email me about it.

That’s it for now. As always, please feel free to contact me or any of our Conference Directors (http://www.charlestonlibraryconference.com/about/conference-directors/) with ideas, suggestions, comments, questions, etc. We’d love to hear from you!
Data Sparks Discovery: The 2016 NFAIS Annual Conference

Column Editor’s Note: Because of space limitations, this is an abridged version of my report on this conference. You can read the full article which includes descriptions of additional sessions at http://www.against-the-grain.com/2016/04/v28-2-dons-conference-notes/. — DTTH

About 150 information professionals assembled in Philadelphia on February 21-23 for the 50th NFAIS Annual Conference, which had the theme “Data Sparks Discovery of Tomorrow’s Global Knowledge.” The meeting featured the usual mix of plenary addresses and panel discussions, the always popular Miles Conrad Memorial Lecture (see sidebar), and a well-received “Shark Tank Shootout,” in which representatives of four startup companies were asked a series of probing questions by a panel of judges.

Opening Keynote: Preparing the Next Generation for the Cognitive Era

Steven Miller, Data Maestro in the IBM Analytics Group, opened his keynote address by noting that data is transforming industries and professions, and the demand for data engineers is skyrocketing. New data-based professions such as “data scientist,” “data engineer,” “data policy professional,” and even “chief data officer” are emerging. The Internet of Things and software analytics have been significant drivers in the emergence of data-based professions and services, for example:

- The Uber ride-sharing service uses GPS data to determine where a car is and how long it will take to arrive at the customer’s location.
- Trimet, the rapid transit system in Portland, OR, has teamed with Google to integrate real-time transit data with Google Maps, allowing smartphone users to easily plan their journeys. (See bit.ly/trimetandgoogle)
- HackOregon is transforming public data into knowledge; for example, large sets of geology data are used in a system to help Oregon residents plan for possible future earthquakes (bit.ly/after-shock).
- London has become the leading city working with open data. The London Datastore (http://data.london.gov.uk/) provides access to wide range of over 500 data sets about London.
- Kabbage (https://www.kabbage.com) has helped over 100,000 small business owners qualify for loans or lines of credit and has redefined the process of obtaining business loans.
- NewRelic (http://newrelic.com/) uses predictive analytics to monitor and analyze software applications and warn developers about overloads and potential outages.
- Many cities are now embedding smart sensors in roadways, buildings, waterways, etc. to send and receive data, thus improving their services.

Obviously, in all these systems, confidence and trust in the data are critical. Many companies have failed in their responsibility to protect data, resulting in significant breaches.

Data is a core business asset, but few colleges have courses in data policy skills. In today’s cognitive era, everyone must become data literate and be able to manage and analyze data. Miller said that “T-shaped” skills (boundary-crossing competencies in many areas coupled with in-depth knowledge of at least one discipline or system) are required.

A look at job listings at www.linkedin.com/jobs/data-engineer-jobs (or data-scientist-jobs) and indeed.com provides a picture of how strong the demand for such professionals is. According to Miller, there are two types of data scientist: human data scientists who advise businesses, and machine data scientists who write advanced algorithms.

Data Usage Practices

Courtney Soderberg from the Center for Open Science said that a reproducibility crisis is occurring in science, and the literature is not as reproducible as we would like to believe. Journals and funders have therefore implemented data sharing policies and are mandating that authors publish their raw data. The Center for Open Science is working to increase openness, reproducibility, and transparency in science. It has built an open source space (see http://osf.io) where scientists can manage their projects, store files, and do research. It is important to make it easy to share data, and not require researchers to invest time learning how to do it.

Lisa Federer, an “Informationalist” at the National Institutes of Health (NIH) Library, said that many definitions of “Big Data” revolve around the four “Vs”:

- Velocity (the speed of gathering data),
- Variety (many types of data),
- Volume (a lot of it), and
- Veracity (good data).

Faster and cheaper technology and an increase in “born digital” data are also providing new roles for librarians to assist researchers who have never before been required to share their data. NIH has created a publicly available planning tool to help researchers create data management plans that meet funders’ requirements, (see http://dpmtool.org) and the NIH library has developed a comprehensive guide to data services resources (http://nihlibrary.campusguides.com/dataservices).

Managing Data and Establishing Appropriate Policies

Heather Joseph, Executive Director of the Scholarly Publishing and Academic Resources Coalition (SPARC) said that data policy development is an evolutionary and iterative process involving the entire research community. It is focused on four major areas:

1. **Policy drivers.** U.S. funders invest up to $60 billion a year in research to achieve specific outcomes, which require free access to the research results and the data.
2. **Policy precedents and developments.** The Open Data Executive Order, issued in 2013 by President Obama, mandated open and machine-readable data as the default for all government information, and a subsequent Public Access Directive begins to lay out the rules for accessing data.
3. **Emergence of research data policies.** Today, three years after the Executive Order, draft or final policy plans have become available for 14 federal agencies.
4. **Policies supporting a robust research environment.** Reiteration of evolutionary policy development, consistent policy tracking, and regular input are vital to promoting a reasonable level of standardization.

Anita De Waard, VP, Research Data Collaborations at Elsevier, discussed the research data life cycle that was developed at Jisc. Important steps in the lifecycle and Elsevier’s involvement include:

- **Collection and capture of data and sharing of protocols at the moment of capture.** De Waard mentioned Hivebench (https://www.hivebench.com/), a unified electronic notebook allowing a researcher to collaborate with colleagues, share data, and easily export it to a publication system.

continued on page 67

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Steven Miller

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<http://www.against-the-grain.com>
Data rescue. Much data is unavailable because it is hidden (such as in desk drawers). Elsevier has sponsored the International Data Rescue Award to draw attention to this problem and stimulate recovery of such data.

Publishing software. Elsevier’s open access SoftwareX journal (http://www.journals.elsevier.com/softwarex) supports the publication of software developed in research projects.

Management and storage of data. Mendeley and GitHub provide versioning and provenance.

Linking between articles and data sets will allow a researcher to identify data sets in repositories. Data sets must therefore be given their own DOIs which will allow them to be linked to articles.

Larry Alexander, Executive Director of the Center for Visual and Decision Informatics (VDI) at Drexel University, said that the Center has a visualization and big data analytics focus and supports research in visualization techniques, visual interfaces, and high performance data management strategies. Some of its noteworthy results include:

• Exploration of the volume and velocity of data streams in a 3D environment,
• Analysis of crime data in Chicago to find hot spots and how they change,
• Prediction of flu hot spots using environmental conditions (temperature, sun exposure, etc.),
• A gap analysis of U.S. patents to predict where new breakthroughs would occur, and
• Mining of PLoS ONE articles to determine popularity of software use.

New Data Opportunities

Ann Michael, President of the consulting firm Delta Think, kicked off the second day by saying that anything to do with data is a new career opportunity. Publishing and media businesses are leveraging data today. Article impacts have become more important; companies such as Plum Analytics and Altmetrics are in the business of providing usage data for journal articles, and Springer’s Bookmetrix does the same for books. Other systems provide different applications; for example:

• Impact Vizor from HighWire Press (http://blog.highwire.org/tag/impact-vizor/) looks at analytics of rejected articles and helps publishers decide if it would be worthwhile to start a new journal to accommodate them;
• UberResearch (http://www.uberresearch.com) builds decision support systems for science funding organizations;
• The New York Times uses predictive algorithms to increase sales and engagement (it is careful to emphasize that such data are not used to make editorial decisions);
• RedLink (https://relink.com) helps marketing and sales teams at academic publishers focus on the needs of their customers; and
• Tamr (http://www.tamr.org) connects, cleans, and catalogs disparate data so that it can be used effectively throughout organizations to enhance productivity.

Building Value Through a Portfolio of Software and Systems

Three entrepreneurs followed Michael and described their products for using data. Overleaf (http://www.overleaf.com) provides a set of writing, reviewing, and publishing tools for collaborators and removes many of the frustrations that authors experience, especially when articles have many of them. Many articles today have more than one international author, and the traditional way of collaboration was to email versions of documents to them, which leads to long email chains, multiple versions of the same document, reference maintenance problems, and lengthy revision times. Now, documents can be stored in the cloud and managed by Overleaf, so most of these problems are removed. Some journals are now receiving up to 15% of their submissions from Overleaf.

Etsimo (http://www.etsimo.com) is a cloud-based visual content discovery platform combining an intelligent search engine and an interactive visual interface to a document collection. In traditional (“lookup”) searching, the user’s intent is captured only in the initial query, so the query must be reformulated if revisions are needed. Etsimo works with keywords in a full-text index and uses artificial intelligence (AI) or machine learning to create connections in the content. A demonstration is available at http://wikipedia.etsimo.com.

Meta (http://meta.com/) is a scientific knowledge network powered by machine intelligence that seeks to solve some of the common problems caused by the current flood of scholarly articles. It is powered by the world’s largest knowledge graph and is coupled with ontologies to unlock the information in scientific articles. Researchers can receive recommendations and discover unknown articles or historical landmark articles based on the concepts and people they follow. Bibliometric intelligence can be integrated into author workflows, which provides significant benefits to all parties in the publication process.

Creating Value for External Institutions and Systems

James King, from the NIH library, described its vision to be the premier provider of information solutions by enabling discovery through its “Informationist” program (see http://nihlibrary.nih.gov/Services/Pages/Informationists.aspx), in which information professionals are embedded into NIH workflows to focus on delivering knowledge-based solutions.

A unique feature of the Informationist program is its custom information services: a “Geek Squad” that provides support to informationists by offering digitization of government publications, database access via APIs, and consulting services.

How Readers Discover Content in Scholarly Publications

At the members-only lunch, Simon Inger presented the results of a large survey that stemmed from the recognition that search and discovery do not happen in the same silo. For journals, there are many ways of discovering articles. For example, this figure shows how some academic readers might navigate to various incarnations of the publisher’s article.

Continued on page 68
Here are some of the findings:

Further observations
- Many free discovery resources, like PubMed and Google Scholar, are used less in poorer countries.
- Use of mobile devices is increasing, but smartphone use remains marginal in most territories; greatest use is in low-income countries.
- Publisher Websites are becoming a more popular place to do a search.

It is important to note that publishers always report that they receive more traffic from Google than from Google Scholar, but traffic from Google Scholar typically comes from link resolvers which are not the original source of the research. Understanding the origins of reader navigation helps publishers, libraries, indexing organizations, and technology companies optimize their products for different sectors across the world.

Globalization and Internationalization of Content

James Testa, VP Emeritus, Thomson Reuters, noted that the ten countries with significant growth in journal coverage in the Web of Science (WoS) database each added at least 40 journals to their coverage in the last ten years. China, Spain, and Brazil have all increased their coverage; coverage of Turkish journals has grown from 4 to 67 journals; and China has quadrupled its annual output to about 275,000 articles in 2015. Here are his interpretations of this data:

- Many obscure journals were revealed with the introduction of the Internet, and the WoS user base became more internationally diverse, so Thomson Reuters began to add more journals to its coverage.
- Australia is ranked first of those journals by citation impact, probably because its journals all publish in English.
- By citation impact, Chinese journals rank in 7th place, which is an indication of their lower quality. Chinese authors receive rewards for publishing in journals covered by the WoS, but their articles tend to be shallow in inventiveness and originality.
- Serious side effects of globalization include the practice of rewarding scholars disproportionately for publishing in high-impact journals, a lower regard for peer review, and excessive self-citations.
- Major progress in communication of scholarly results has been achieved, but efforts to gain higher rankings by unethical behavior are suspect.
- Secondary publishers must demonstrate that their procedures to remove questionable entries from their publications are effective.

Stacy Olkowski, Senior Product Manager at Thomson Reuters said that patents contain extremely valuable technical information; the claims are like recipes in a cookbook. Some 70% of the information in patents cannot be found anywhere else in the research literature. Patents are like recipes in a cookbook. Some 70% of the information in patents cannot be found anywhere else in the research literature. Patents are more than just technical documents and can provide answers to market- and business information questions. Focusing on China, Olkowski said that there has been an incredible growth in the numbers of papers being published in Chinese journals, and the same trend has occurred with Chinese patents. The Chinese government has been paying people to apply for patents. Since 2003, the Chinese government has been paying people to apply for patents. The Chinese government initially questioned whether they should establish a patent office, but they did so in 1984, and now it is first in the world in numbers of patent applications with the Chinese patent office are from Chinese nationals. Since 2003, the Chinese government has been paying people to apply for patents. The Chinese government has been paying people to apply for patents. The Chinese government initially questioned whether they should establish a patent office, but they did so in 1984, and now it is first in the world in numbers of patent applications with an annual growth rate of about 12.5%. About 85% of the applications to the Chinese patent office are from Chinese nationals. Since 2003, the Chinese government has been paying people to apply for patents. The Chinese government has been paying people to apply for patents. The Chinese government initially questioned whether they should establish a patent office, but they did so in 1984, and now it is first in the world in numbers of patent applications with an annual growth rate of about 12.5%. About 85% of the applications to the Chinese patent office are from Chinese nationals. Since 2003, the Chinese government has been paying people to apply for patents. The Chinese government has been paying people to apply for patents. The Chinese government initially questioned whether they should establish a patent office, but they did so in 1984, and now it is first in the world in numbers of patent applications with an annual growth rate of about 12.5%. About 85% of the applications to the Chinese patent office are from Chinese nationals. Since 2003, the Chinese government has been paying people to apply for patents. The Chinese government has been paying people to apply for patents. The Chinese government initially questioned whether they should establish a patent office, but they did so in 1984, and now it is first in the world in numbers of patent applications with an annual growth rate of about 12.5%. About 85% of the applications to the Chinese patent office are from Chinese nationals. Since 2003, the Chinese government has been paying people to apply for patents.

Donald Samulack, President of U.S. Operations for Editage (http://www.editage.com), presented a concerning picture of the globalization of the Chinese published literature. He said that Western publication practices have typically been built on trust and rigorous peer review, but there has been a tsunami of articles from China, and there is an entrepreneurial element of commerce in every part of Asian society, which has led to an erosion of this trust and honesty. There are irresponsible and in some cases predatory commercial elements in Asia that prey on facets of the Chinese publication process, such as authorship for sale (see http://scipaper.net), plagiarising, writing and data fraud, paper mills,
hijacked and look-alike journals, and organizations that sell fake impact factors and misleading article metrics. Without appropriate guidance regarding publication ethics and good publication practices, Chinese researchers fall prey to these scams.

In response to unethical practices that led to the retraction of many articles by Chinese authors, the Peking University has recently issued a policy of standard conduct in international publication. According to Samulack, some scientists have been removed from their academic positions and forced to repay grant money to the government. He and others have proposed the formation of a Coalition for Responsible Publication Resources (CRPR, http://www.rpcoalition.org/) to recognize publishers and vendors that are “vetted as conducting themselves and providing services in alignment with current publishing guidelines and ethical practices, as certified through an audit process...” so that authors can readily identify responsible publication resources. Articles describing efforts to combat unethical publication activities have been published in Science, Nature, and on the Editage Website (http://www.editage.com/insights/china-takes-stern-steps-against-those-involved-in-author-misconduct).

Shark Tank Shoot Out

The final day of the NFAIS meeting began with a very informative session in which four entrepreneurs briefly described their companies and products and then were subjected to questioning by three judges: James Phimister, VP, ProQuest Information Solutions; Kent Anderson, Founder, Caldera Publishing Solutions; and Christopher Wink, Co-Founder, Technical.ly. The questions were very intense and probing and mainly centered around the companies’ business models (they reminded me of the process one goes through when taking oral exams for a PhD degree!). Here are summaries of the four companies.

- **Expernova** (http://en.expernova.com/) finds an expert to solve a problem by accessing a database of global expertise that contains profiles of 10 million experts and 55 million collaborations.
- **Penelope** (http://www.penelopeeresearch.com/) reviews article manuscripts, detects errors such as missing figures or incorrect references, and checks for logical soundness, statistics, etc. to eliminate errors and shorten review times.
- **Authorea** (https://www.authorea.com/) is a collaborative writing platform for research. It contains an editor for mathematics equations, makes it easy to add citations, comments, etc., and provides 1-click formatting to create and export a PDF of the completed article. A selection of published articles written on Authorea is available at https://www.authorea.com/browse.
- **ResearchConnection** (https://researchconnection.com/) is a centralized database of university research information that allows students to search for prospective mentors and is searchable by location, university, and subject. Its target market is the top 200 U.S. universities and 3 million students seeking advisors and applying to graduate schools.

At the end of the session, the judges declared Authorea the winner of the shoot out because of its network potential, freemium business model, and likelihood of attracting investors.

Leveraging Data to Build Tomorrow’s Information Business

Marjorie Hlava, President, Access Innovations, said there are three levels of artificial intelligence (AI):

1. Artificial narrow intelligence is limited to a single task like playing chess.
2. Artificial general intelligence can perform any intellectual task that a human can; and
3. Artificial superintelligence, in which the machine is smarter than a human, is the realm of science fiction and implies that the computer has some social skills.

The major AI technologies include computational linguistics, automated language processing (natural language processing, co-occurrence, and

The Miles Conrad Memorial Lecture

Long time attendees at NFAIS annual meetings will know that the Miles Conrad Memorial Lecture, given in honor of one of the founders of NFAIS, is the highest honor bestowed by the Federation. This year’s lecturer was Deanna Marcum, Managing Director of Ithaka S+R (http://www.sr.ithaka.org/), who was previously Associate Librarian for Library Services at the Library of Congress. She presented an outstanding and challenging lecture on the need for leadership changes in academic libraries in today’s digital age. The complete transcript of Marcum’s lecture is available on the NFAIS Website at https://nfais.memberclicks.net/assets/docs/MilesConradLectures/2016_marcum.pdf.

Marcum said we have moved beyond simply providing support for searches and are educating students on Web technologies; all libraries are digital now, so they have become leaders in the digital revolution. But there is more to do; academic libraries must make dramatic changes, and a different kind of leadership is necessary, especially at the executive level.

According to Marcum, most academic library executives have at least one foot in the print world and have been trained to focus on local collections. However, a national and global mindset is essential, which requires a different kind of leadership. Marcum applied 10 practices of digital leaders that were found in a study of successful digital organizations1 to the library profession:

1. Build a comprehensive digital strategy that can be shared repeatedly. Users need immediate access to electronic information.
2. Embed digital literacy across the organization. Librarians must know as much about digital resources as they do about print ones.
3. Renew a focus on business fundamentals. We must integrate digital and legacy resources to give currency to our mission.
4. Embrace new rules of customer engagement. Users are now in control and can decide what is most important and how much it is worth.
5. Understand global differences in how people access and use the internet. We must provide services to a widely diverse population.
6. Develop the organization’s data skills. Leaders must rely on data-driven decisions instead of past practices.
7. Focus on the customer experience. Design services from the customer’s perspective; there is no “one size fits all.”
8. Develop leaders with skill sets that bridge digital and traditional expertise. Help staff on both sides of the digital divide see the value the other brings.
9. Pay attention to cultural fit when recruiting digital leaders. Minimize silos and focus on customers. Empower leaders who can advance digital objectives in an inspirational rather than a threatening way.
10. Understand the motivations of top talent. Make it attractive to remain with the organization by making sure that there is excitement in the library.

Libraries are at a pivotal point now, and survival depends on becoming a node in a national and international ecosystem. Information needs are enormous and vast; digital technology has opened the doors for us.

Against the Grain / April 2016
Changing Library Operations — Conclusions from Consortial Demand-Driven eBook Pilot at the University of California

Column Editors: Allen McKiel (Dean of Library Services, Western Oregon University) <mckiela@wou.edu> and Jim Dooley (Head of Collection Services, University of California, Merced) <jdooley@ucmerced.edu>

One constant over the last several years has been library experimentation with various e-book acquisition models. While the majority of these experiments have involved individual libraries, some, most notably by the Orbis-Cascade Alliance, have involved consortia. As a result of the experience of the Alliance with a consortial Demand-Driven Acquisitions (DDA) program, the University of California (UC) Libraries decided in 2013 to implement a systemwide DDA pilot with ebrary and YBP. The pilot began in January 2014 and ended on December 31, 2015.

This column in the June 2014 issue of Against the Grain reported on the first four months of the pilot. Michael Zeoli, in his review of Academic E-Books: Publishers, Librarians, and Users in the December 2015-January 2016 issue of Against the Grain quotes some statistics for the UC pilot from August 2014. In the interest of providing a complete picture, this column will report the results of the full two years of the pilot and discuss next steps.

The details of the structure and organization of the pilot can be found in the June 2014 “Changing Library Operations” column. Briefly, the pilot involved 63 university press publishers and was limited to social science and humanities (not including art) titles with publication years between 2010 and 2015. All UC campuses participated except for the University of California, San Francisco (UCSF) which is exclusively a graduate health and life sciences campus. Central administration of the pilot was performed by the California Digital Library (CDL), a unit of the University of California Office of the President. YBP profiled the titles to be included in the discovery pool and managed the deposit account. Titles were purchased after three Short Term Loans (STLs). When a purchase was triggered either three or four copies of that title were acquired to provide access for all nine participating UC campuses. The number of copies acquired was based on historic average systemwide print purchases per title per individual publisher.

Don’s Conference Notes
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Inference engines, text analytics, and automatic indexing), and automatic translation. Semantics underlie all these systems which work more accurately with a dictionary or taxonomy.

Access Innovations is pushing the edges of AI and is developing practical applications for publishers. Support for Level 1 AI includes concepts, automatic indexing, and discovery. Semantic normalization tells us what the content is about, so we can now issue verbal commands, retrieve relevance results, filter for relevance to the requestor, and sometimes give answers.

Expert System (http://www.expertsystem.com/) develops software that understands the meaning of written language. Its CEO, Daniel Mayer, said that publishers have enormous archives of unstructured content and are looking for ways to exploit it and turn it into products. They want to help users find information faster and easier, focus on the most relevant content, find insights, and make better decisions. Faceted search, a recurring feature of online information products is supported by taxonomies and offers users an efficient way to access information. Content recommendation engines let users discover things unknown to them using AI technologies. The end goal is to provide a faster way of getting to an answer, not just to the content.

C. Lee Giles, Professor at Pennsylvania State University, defined scholarly big data as all academic or research documents, such as journal and conference papers, books, theses, reports, and their related data. The CiteSeerx system (http://dxstatic.ist.psu.edu/about) has a digital library and search engine for computer and information science literature and provides resources to create digital libraries in other subjects. It can extract data from tables, figures, and formulas in articles.

Closing Keynote: AI and the Future of Trust
Stephane Bura, Co-Founder, Weave (http://www.weave.ai/) said that trust is a guiding principle and will have the most impact on our information systems. He presented illustrations in the context of video games, which are designed to cater to players’ emotions by using their motivations. Extrinsic motivations come from outside of us; we experience them when we choose to use a service. But the real motivations that drive us are intrinsic:

• Mastery: the desire to be good, or competence,
• Autonomy: the desire to be the agent in your life, set your goals, and reach them, and
• Relatedness: the desire to connect and find one’s place in the community.

Donald T. Hawkins is an information industry freelance writer based in Pennsylvania. In addition to blogging and writing about conferences for Against the Grain, he blogs the Computers in Libraries and Internet Librarian conferences for Information Today, Inc. (ITI) and maintains the Conference Calendar on the ITI Website (http://www.infotoday.com/calendar.asp). He is the Editor of Personal Archiving (Information Today, 2013) and Co-Editor of Public Knowledge: Access and Benefits (Information Today, 2016). He holds a Ph.D. degree from the University of California, Berkeley and has worked in the online information industry for over 40 years.

Endnotes
In December 2015 the task force formed to conduct the pilot prepared a detailed assessment of results through October 2015. This column will focus on the results of this assessment supplemented by some additional data through December 2015.

The principal finding of the assessment was that the pilot was successful in testing a system-wide eBook DDA model for the University of California. The nine participating campuses and CDL demonstrated that they could work together to plan and implement such a pilot. Access to titles from 63 university presses was provided to nine UC campuses at a systemwide cost of $27.57 per purchased title, per campus. Beyond experimenting with a particular business model, another purpose of the pilot was to test campus interest in eBooks in the Humanities and Social Sciences. The usage data show that interest is high, particularly in Social Sciences (general) and in History. Although the pilot included titles published between 2010 and 2015, usage was concentrated in titles published in 2013 and 2014.

An initial concern was that a majority of the funds would be expended on Short Term Loans to provide access rather than on purchases to build research collections. Given the way the pilot was structured, this concern proved unfounded. Within the pilot the STL costs were 16% of the budget compared to 84% spent on purchases. This result was skewed to some extent due to the multiplier of three or four when a title was purchased. Presumably a different business model could have produced different proportions of spending on STLs vs. purchases.

During the twelve-month period between September 23, 2014 and September 28, 2015 there were 2,538 STLs and 415 titles purchased out of a discovery pool of 4,378 titles. Purchased titles were 9% of the available titles and 1,412 unique titles (32%) had STL activity. Of the 63 participating publishers, 38 had purchases (60%) and 56 (89%) had STL activity. The average list price was $76 for a single copy and $248 with the systemwide multiplier. From the official start of the pilot in January 2014 (although it took several months to fully implement) through December 2015, 12% (578) of available titles were purchased out of a discovery pool of 4,784 titles.

A number of participating publishers, including New York University Press, University of Chicago Press, and Oxford University Press, significantly raised STL rates during the pilot. The task force decided to keep all participating publishers in the discovery pool for the duration of the pilot. However, if the pilot had continued it is possible that publishers that had significantly raised STL rates would have been dropped. Three publishers instituted STL embargoes of 12 months (MIT Press and Cornell University Press) or 18 months (New York University Press) during the pilot which resulted in their front list titles being available in the pilot. Again, had the pilot continued a decision would need to be made regarding the inclusion or exclusion of publishers with STL embargoes.

Another frequently raised concern with DDA plans is usage of eBooks after purchase. As stated above, 415 titles were purchased during the assessment period. Total aggregated usage of these titles after purchase was 440,524 uses. Each of the 415 titles had post-purchase usage, ranging from fewer than 100 uses (94 titles) to over 10,000 uses (4 titles). Over half of the purchased titles (224 titles) ranged between 100-500 post-purchase uses. Since the pilot provided a fixed number of copies rather than unlimited simultaneous usage, turnaways occurred when the number of concurrent users was exceeded. During the pilot there were 685 turnaways involving 114 titles.

During the assessment period purchases occurred mainly in Social Sciences (111 titles) and History (81 titles) although purchases also occurred in Literary Criticism, Political Science, Business and Law. Within Social Sciences the most popular subject was Sociology/General followed by Anthropology/Cultural.

Before the pilot actually began, the first issue to be addressed was publisher willingness to participate. Of the 193 international university presses available on the ebrary platform in 2013, only 63 agreed to participate in the UC pilot when contacted by ebrary. The task force managing the pilot was explicit that it wanted to test the use of STLs, so a reasonable assumption would be that those publishers that declined to participate did so because of an objection to the use of STLs rather than to DDA in general. This assumption may be tested in future projects employing different models. In any event, slightly less than one-third of the university press publishers contacted agreed to participate in the pilot. A small number of publishers were participating in DDA programs with other vendors and were therefore not available to participate in the UC pilot with ebrary.

Another publisher-related issue is that 30% of participating publishers made less than 50% of their total publishing output available through ebrary. Limited title availability could have contributed to lower activity for those publishers during the pilot. On the other hand, 43% of participating publishers offered 75% or more of their output for the pilot. Less than full availability of publisher output, particularly front lists, through aggregators has long been a problem for libraries extending far beyond particular models such as DDA with or without STLs. Specifically for the pilot, selectors at many UC campuses were unable to determine if particular titles from participating publishers would in fact be available through the pilot or if these titles would have to be firm ordered.

A different type of problem was the ongoing difficulty in receiving MARC records containing OCLC numbers from ebrary, now ProQuest, in a timely manner. Records were harvested by ebrary from the UC Shared Cataloging Program (SCP) and distributed to the participating campuses. The June 2014 “Changing Library Operations” column placed the majority of the blame on OCLC; subsequent events in fact mostly lay with ProQuest. The issue became pronounced in the last quarter of 2015 when the situation deteriorated to the point that the SCP was required to download records directly from WorldCat for distribution.

During the pilot participating libraries decided not to try to de-duplicate print acquisitions against the eBooks in the pilot although this would have been an issue had the pilot continued as a permanent program. Campuses with local eBook DDA plans already in place reported the lowest duplication numbers. This may be due to these campuses having already reduced print acquisitions in favor of eBooks. YBP introduced a method for de-duplicating local print approval plans against the system-wide DDA profile in fall 2014. However, according to YBP, 50% of eBooks currently significantly lag the publication of their print counterparts. Thus it is still possible for a large number of print titles acquired through local approval plans to be received before the electronic version is available. Individual libraries varied as to whether they de-duplicated their local e-DDA plans against the systemwide pilot.

At the conclusion of the pilot the task force managing the pilot made two principal recommendations that have been adopted. First, the scope of the task force has been expanded beyond the implementation of a DDA pilot using STLs to include other models of eBook acquisition; in recognition of this expanded scope the task force has been renamed the Emerging E-Book Models Task Force. This signifies a general recognition within the UC Libraries that eBooks have become sufficiently important to require at least a semi-permanent body to investigate, monitor, recommend, and in some cases implement systemwide eBook programs.

In 2013 the UC Libraries published an E-Book Value Statement http://libraries.universityofcalifornia.edu/groups/cdc/docs/UC_Libraries_E-Book_Value_Statement.pdf detailing the aspirational goals toward which the UC Libraries would work in developing systemwide eBook programs. The statement lists many desirable aspects of such a program in the areas of content support, research and instruction, fair use and scholarly communications, positive user experience, product platforms, and sustainable and fair business models. At this time the offerings of commercial aggregators are not well aligned with many of the principles of the Value Statement. A second recommendation was that the task force experiment with a vendor whose products more closely align with the Value Statement. Preliminary investigations have begun; hopefully, decisions will be made and a new pilot launched reasonably quickly.

The UC Libraries remain interested in DDA as an important mechanism for acquiring eBooks. At the same time publishers have made the use of STLs problematic by significantly raising rates and instituting embargoes on front list titles. The time appears ripe to explore other DDA models. The goal is not to conduct pilots, but for many it is to implement a sustainable, permanent systemwide program to acquire eBooks for the UC Libraries that will most likely utilize some form of DDA. Time will tell if this goal is achievable. 🍊
Curating Collective Collections — HathiTrust Launches Its Shared Print Monograph Archive

by Thomas H. Teper (Associate University Librarian for Collections and Technical Services, University of Illinois at Urbana-Champaign) <tteper@illinois.edu>

Column Editor’s Note: HathiTrust’s print monograph repository project is the largest in geographical scope of any shared collections project to date and has the potential over the next few years to become the largest in terms of volumes committed to retain. Because of its sheer size, the roles Hathi members play in state and regional resource-sharing partnerships, and the efficiencies and technologies needed to declare so many retention commitments, the repository will have substantial influence on the development of other shared print programs, the development of a national structure for print access and preservation, and the services OCLC offers members in support of shared print agreements. My guest columnist this issue, Tom Teper, was Chair of the task force that created the shared monograph plan; he and the other members of the task force, Clement Guthro, Erik T. Mitchell, Jacob Nadal, Jo Anne Newyear Ramirez, Matthew Revitt, Matthew Sheehy, Emily Stambaugh, Karla Stieb, and your column editor met by phone and in person over the course of several months and consulted with HathiTrust Program Steering Committee Chair Bob Wolven, Hathi members in October 2014, and Hathi Executive Director Mike Furlough in the course of their deliberations. Tom reported on the Hathi project at the Print Archive Network Forum in January and June 2015, and I am grateful to him for taking keyboard in hand and offering the readers of ATG this account of the project’s main features. — BK

Recent decades have witnessed significant, even transformational changes in research libraries. Chris Ferguson has characterized these changes as a “massive and rapid shift from print to digital information resources, from on-site services to virtual services through the network, from an emphasis on our values and visions to those of others…”

Longtime independent operators that collaborated when good and necessary in a world of physical materials, research libraries’ operations and collections are now beginning to mimic the networked environment of the virtual world in which they house their collections and offer service.

At my own library, the University of Illinois at Urbana-Champaign, spending continues to skew in the direction of electronic delivery, with the total materials allocation being 75% spent on electronic resources. This commitment certainly carries implications for staffing and the types of services offered, but it also requires rethinking the management of print materials, especially those that are less used, highly duplicated, and available online. Locally and consortially, this rethinking has manifested itself in multiple efforts in the last several years to develop retention agreements for printed serial literature. The Committee for Institutional Cooperation (CIC), Scholars Trust, and Western Storage Trust (WEST), for example, are groups of libraries engaging in establishing retention commitments that enable member institutions to draw down duplicated print serial titles if they wish.

Such print retention commitments for serials focus on the volume of space that members may recover and have met with considerable success. In concentrating on serials, however, they leave vulnerable to loss far less commonly held titles, including many serials to be sure but also a range of other material types, in particular, monographs, for which distribution patterns, rates of duplication, traditional management strategies, and the prospect of space gain are very different from serials.

To address this situation and advance its stated goals of “develop[ing] partnerships and services that ensure preservation of the materials in the HathiTrust and the entire print and digital scholarly world” and “reduc[ing] the long-term capital and operating costs of storage and care of print collections through redoubled efforts to coordinate shared storage strategies among libraries,” the HathiTrust’s governing board approved a ballot initiative in 2011 calling for the development of a print monographs archive. In the spring of 2014, it charged a Print Monographs Archive Planning Task Force to design a program that would serve both the HathiTrust membership and the broader scholarly community (https://www.hathitrust.org/print_monographs_archive_charge).

Working between June 2014 and March 2015, we on the task force completed a report that summarizes recommendations with respect to the composition, phased construction, operating systems, business model, and governance of the HathiTrust Shared Print Monograph Program (HTSPMP). Reviewed by the HathiTrust’s Program Steering Committee, our report was published in June 2015 with an initial set of recommended actions and an implementation calendar of five years (https://www.hathitrust.org/files/sharedprintreport.pdf).

The HathiTrust Shared Print Monograph Program

Our report and recommendations outline a cooperative program that rests on several assumptions, perhaps the most important of which are that, at least in its first five years, the print monograph repository

• will mirror the monographic holdings of Hathi’s digital archive,

• be built from and regionally distributed amongst members’ general, circulating collections,

• be housed in a combination of active shelving and high-density facilities, and

• be lendable.

Moreover, the model we outline calls for the repository to be governed, managed, developed, and financially supported by HathiTrust, not by a subset of members; in other words, membership in HathiTrust will equate to membership in the repository, although not all members will be required to hold materials on behalf of the group. Built, collaboratively stewarded, and supported by the membership as a public good for as rapid and comprehensive a standup as possible, the proposed repository is at once conservative in its goals for retention of print monographs and highly transformational in its implication for the local and collective management of collections.

Among the more challenging topics we discussed was whether the repository should rely on a risk model, that is, whether the archive should seek to acquire a threshold number of copies for each volume in order to establish a minimal level of risk for each title, or whether the repository should overthrow convention and seek some other mechanism for achieving the HathiTrust’s goals. Adopting the risk model faced two significant impediments — scope and feasibility. First, with over 6,800,000 monographs ingested in the digital repository, a distributed repository of multiple print copies could quickly reach...
numbers upwards of 18,000,000 commitments with no effective model for telling individual institutions that Hathi sought retention commitments for some volumes and not others. In discussing the development of such a model, the task force quickly identified a new risk — the risk of HathiTrust falling prey to such a severe case of analysis paralysis that it would delay development and implementation of the retained collection beyond the point where the conversation would still be relevant to the membership.

The second issue confronting the risk model centered on the issue of feasibility when it came to reaching copy-number thresholds. For example, while many volumes are widely held across member libraries, many others are held in ones and twos. This scarcity creates a long tail of material uncommonly held and can be seen across much larger bodies of member institutions. It would present HathiTrust with a perennial challenge: could an item held by only one member be considered preserved if there was only one retention commitment made?

In considering these and other questions, we recommended establishing an initial target of matching 50% of the digital collection of monographs, roughly 3,000,000 titles at the time the report was written. The initial build-out of the repository will not be driven, as noted, by a risk model that might focus on scarcely held titles or the establishment of a minimum number of copies but rather will develop rapidly from large commitments from a group of volunteer libraries. Most of the repository’s early requirements in terms of retention commitments, materials housing standards, verification, and access or delivery mechanisms will be relatively lightweight as the repository is built. Relying as did the development of the digital repository on the recognition of common interests and values, low-cost voluntarism, and services currently in place among members, the retained monograph collection will therefore be able to develop quickly and more readily play the transformative role envisioned for it.

Indeed, as we concluded our work, we were keenly aware of this initiative’s urgency in the minds of many in the community. Implementation of the repository program will require that some institutions balance human-resource and financial commitments to the HathiTrust’s effort with commitments to other state and regional resource-sharing and print-retention agreements, yet we do not believe that the HathiTrust initiative should seek to supplant those agreements. Rather, we believe that it will serve as a complement to those initiatives that are growing at the state or consortial level.

Beginning with the release of the report for public consideration in June 2015, the HathiTrust Program Steering Committee and Governing Board set in motion the process of launching the monograph repository. In late 2015, HathiTrust began recruiting for a Program Officer to lead the project. In March 2016, HathiTrust announced that Lizanne Payne, a nationally recognized expert in shared collections management, will join HathiTrust as the Program Officer for Shared Print Initiatives. Starting in May 2016, Payne will have responsibility for planning, organizing, and implementing the shared print monograph archive, a program that will have a lasting impact on the future stewardship of the print record.

The Transformative Role of the Repository Program

The task force’s recommendation that the retained collection be persistent accords with the mission of the HathiTrust digital archive and the historic mission of many HathiTrust members. Moreover, the size, prominence, geographic distribution, and multiple affiliations of HathiTrust members and the position Hathi itself occupies in the library community establish the repository as a component of nationwide and potentially international programs of print retention and management. Developing the repository requires a new, broadly usable technical infrastructure that enables disclosure of retention commitments, easy discovery of those commitments, and local/consortial collection management decisions based on commitments. For these reasons, the HathiTrust’s distributed monograph repository will help shape the shared print policies, governance structures, and financial regimes that enable the coordination of retention and archiving efforts across consortia and regions; most important, it will encourage a community-wide approach to managing the collective collection by producing a critical mass of public retention commitments, defining new preservation and collection management standards, and catalyzing enhanced service development.

From the point that it initiated its work, HathiTrust sought to be a leader in helping to transform how libraries manage their collections. In our recommendations, we sought to develop a program that would position HathiTrust and its members to lead in print retention as they did in digital preservation and service provision. Through the repository, HathiTrust stands poised to make further, transformative impacts on the management of libraries and the mechanisms by which they provide services to their constituents. The repository will fulfill HathiTrust’s purpose of creating a “new paradigm by which research libraries and other academic libraries can develop shared reliance on a scholarly print record that is collaboratively stewarded and supported as a public good.”

Endnotes
Biz of Acq — Implementing a Shelf-Ready Workflow at UMBC

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Context and Rationale for Investigating Moving to a Shelf-Ready Workflow

In the fall 2015 after a year and a half, the Technical Services Department in the Albin O. Kuhn Library & Gallery at the University of Maryland, Baltimore County (UMBC) had a working shelf-ready processing workflow. To reach this point, had been a truly collaborative endeavor involving not just staff in Technical Services but input from other departments within the library as well as working with the systems staff at our central technical office, Digital Stewardship and Services (DSS) at the University of Maryland, College Park, who manage our consortium’s ILS.

Beginning in the spring of 2014, we began exploring the possibility of implementing a shelf-ready workflow for our print books. Many organizations decide to move to shelf-ready processing to help relieve pressures for overloaded staff or in order to continue processing materials at the same rate but with fewer staff. When we began investigating, we were not expecting high staff turnover. In fact, one of the main motivations in investigating the possibility of implementing shelf-ready processing was if we could automate the processing of many of our orders, then staff might be able to shift focus and spend time on tasks that could not be automated, such as special collections materials, or providing descriptive metadata for digital collections.

After the proposal to implement a shelf-ready workflow was approved by the Library Director and the library’s management team, work began on completing the necessary tasks to set it up with YBP, our vendor. This was a multi-step process with the first step being to provide the necessary specifications. Because of the vigilance and expertise of our Acquisitions Librarian and Catalog and Metadata Librarian, we were able to successfully navigate this part of the process.

Physical Processing Specifications

YBP provided a laundry list of physical processing services. Each step incurred an additional cost, so the goal was to identify the most broadly useful minimum of processing. Materials that required processing that varied from this common denominator were either excluded from shelf ready or the processing was altered to fit. Special Collections materials were excluded from shelf ready as processing varied too much from the common denominator. Reference materials were added to the shelf ready process by changing former practices to match the common denominator. Focus on the useful minimum of processing for shelf ready materials also provided the opportunity to streamline physical processing steps for all circulating materials. Including date due slips and date of receipt stamping inside the item increased the cost of shelf ready processing. Excluding these steps for shelf ready items allowed the decision to discontinue these steps for all circulating materials.

With the steps to be performed listed out, a YBP supplied questionnaire required that the details of location, number, and other variables be specified for each of the steps. Tasks performed with little thought on a daily basis by a variety of staff needed to be written out and specified in great detail. The exact location for barcode placement required that the cover, the corner of the cover, the distance in two directions from edges of the cover all be identified. Barcode placement specifications also needed to remain within the acceptable range required by a self-checkout kiosk in circulation. Property stamping required a similar level of detail on location(s), with the addition of font size and ink color. Call number labels probably represented the ultimate in detailed physical processing specifications. Type of label stock and font were only the beginning. Call numbers included both prefixes, such as collection codes, and suffixes, such as volume numbers, and both needed to be listed accounting for all allowable variations. Instructions on the line by line parsing of the Library of Congress Classification numbers for the labels ran to many sentences. Scans of existing spine labels were included to supplement and clarify the textual descriptions.

Cataloging Specifications

Unlike physical processing, the options for record selection or cataloging treatment were few. Here the decisions rested upon how complete a record was desired. At the point of processing the physical item, YBP would choose “the best available OCLC record” that matched the item for download into the catalog. This was the floor for the vendor provided service. For an additional charge, YBP would provide at least one subject heading and a complete call number, if these were lacking in the best available record. An additional level of service offered a more complete record. In the event there was no matching record, options included supply no record, a brief record, or increasingly complete records. Some of these levels of service would not support spine label generation, and the goal remained to have the maximum percentage of materials ordered via this program come as shelf ready. In the end, a level of service that provided sufficient information to generate spine labels was chosen over the most expensive level. This decision seemed the most cost-effective decision, assuring the highest percentage of ordered materials would arrive with labels at the lowest possible cost.

Serial issues with a distinctive title represent a small percentage of purchases, but a substantial wrinkle in cataloging decisions. YBP provided support in this area by offering the option to supply a brief record when a serial record was the best record available. The decision on record choice would then become a local one. This option was chosen, as well as deciding that serial issues would not be ordered via shelf ready. An additional service was offered to allow for local decisions on class together series. This would be particularly useful if an institution did not follow the LC practice with a series title. UMBC uses Library of Congress Classification and attempts to follow LC practice for series titles, so this option was not of interest.

Understanding Workflows

At the time when we were implementing shelf-ready, we had a pre-existing YBP GOBI workflow. When orders were placed, YBP sent Electronic Order Confirmation Records (EOCRs) to our central technical office, Digital Stewardship and Services (DSS) at the University of Maryland, College Park, and they loaded these records into our shared ILS. The loader for this workflow utilizes existing bibliographic records when present, attaching an order and an item record to them. We provide the ILS system number for the bibliographic record that the order and item should be attached to in the specified GOBI field. When there is no existing, matching record, the loader creates a new bibliographic record based on the information in the EOCR, and creates an order and item attached to it. Values are mapped into the order records from GOBI, and all items are set to be in the stacks collection, with an

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item status of “on order.” If necessary, the collection is changed later based on notes mapped from GOBI into the order record. When items are shipped to us, YBP sends EDI invoices to DSS, and they load the invoices, attaching to it the orders created when we placed the orders. All the YBP materials that arrive go to one staff member, who receives them and sends them on to a copy cataloger.

We knew from the beginning that not all items would be ordered as shelf-ready, so we would still need this workflow. This meant that we would have two YBP workflows: shelf-ready, and not shelf-ready, and that the technician placing the orders would have to choose the appropriate workflow at the time of order. Each workflow would be associated with a particular sub-account, and the sub-account selected at the time of order would determine if an item would get shelf-ready processing or not. Items going to special collections would not get shelf-ready processing, because they get special processing, in that nothing is permanently attached to the piece. Serials issues ordered as books also wouldn’t get shelf-ready processing, to allow for decisions on treatment. Finally, replacements would never be ordered shelf-ready, as these could result in a variety of database cleanup situations. The staff member who receives YBP materials would need to have two workflows and two procedures, one for materials not ordered shelf-ready, which she’d receive and pass on to a copy cataloger, and another for items received shelf ready, which she’d eventually theoretically be able to receive, check for a record match, and send to the stacks.

Our new shelf ready workflow would work like our existing workflow, up to the second pass load that happens when items ship. For this, DSS would develop a new loader for us, based on an existing University of Maryland, College Park loader that loads shelf ready records. This new loader, referred to as the second pass loader, varied substantially from our existing loader. We came to an understanding of how it worked through observation after it was in place. In the existing workflow, we receive EDI invoices, but in the shelf ready workflow, MARC records come with invoice data embedded, and the loader utilizes the embedded data to create invoices. The first pass loader matched records via the system number we provided in the order. The second pass loader looked in the system for an

As part of the implementation process, the first several batches of records items were received and copy cataloged using the new combined procedure. The staff person who had been doing the receiving and some copy cataloging in the past executed the new procedure. These batches were reviewed by the Catalog and Metadata Librarian to identify issues requiring follow up beyond the skills of the staff person. The issues became a problem sheet used by the staff person. When these issues were encountered in the combined procedure, the problem sheet was marked to match, and the item was kicked out of the workflow for problem resolution by the Catalog and Metadata Librarian. Marking the sheet saved time in problem resolution, and highlighted frequently occurring issues that might be solved by investing time in other solutions. Some frequently occurring issues were fixed by requesting loader changes, system record validation changes, and procedure changes. Conversations between the staff person and the Catalog and Metadata Librarian also led to productive tweaks in the procedure that saved time and steps. Overall, this stage of implementation was treated as a work in progress with frequent conversations, and encouragement of suggestions.

Implementation and Troubleshooting

Implementation occurred in quick steps after all the account set up, programming, loaders, and contracts were in place. A first set of orders were placed, a first batch of final cataloging records were sent, and loaded into test. When the actual items arrived, the Acquisitions Librarian checked the invoice against the items and the Catalog and Metadata Librarian reviewed the items against the records in test. During the review of the cataloging, issues for follow up were identified both for YBP and the local loader. In response, YBP made corrections, but these could only be tested with the next batch of orders. DSS staff modified the loader, and reloaded the records into test, so this fix could be tweaked and adjusted prior to the placing of another batch of orders. Both YBP staff and the DSS staff cooperated fully and responded in a very timely fashion over the course of about two months as issues arose. The first couple of loads were run into test, reviewed and then moved over into live. After these few loads, all future loads went automatically into test then live with no review between.

One of the most useful tools for identifying and tracking issues were the local loader reports generated by the DSS staff. There are separate reports for each loader. Among the details these reports provide is information on the creation of items, holdings, orders created, and serial records that are loaded. If the number of records, items and orders did not match in the first pass loader report, this would be a signal that there was a problem with the load. If orders were created during a second pass load, this meant that there were now two orders in the system for the same item.

Outcomes and Future Plans

Implementing a shelf-ready program took much longer than we expected so that benefits in terms of noticeable changes in workflows and workloads have been slow to materialize. Hopefully, the data we gather will help us make the case for continuing. At the very least, with the majority of the print book orders being processed through the shelf-ready workflow, the hope is that we can shift the priorities of staff to materials that require more time and expertise to process. Looking ahead there might be opportunities to process some of our non-print materials via a shelf-ready workflow. While we may have been a little late to the game for establishing a shelf-ready workflow, as we gather data to evaluate the program, it is still affords us an opportunity to work efficiently and make the most of the knowledge and skills of our staff.
Let's Get Technical — The Paper Chase: How One Library Tackled the Chaos of Media Ordering

Column Editors: Stacey Marien (Acquisitions Librarian, American University Library) <smarien@american.edu>
and Alayne Mundt (Resource Description Librarian, American University Library) <mundt@american.edu>

The Situation

The Media Services (MS) Unit of the American University Library develops and maintains a collection of visual media materials, offers media related services, and provides classrooms, equipment, and other playback facilities in support of the academic and staff development programs of the University. The collection contains approximately 15,000 DVDs and approximately 50,000 streaming titles. MS has their own budget that runs between $40,000 to $50,000 a year. About 1,000 DVDs are purchased annually.

The Problem

Previously, all media requests were submitted to Acquisitions by the Media Librarian. These orders were madness and chaos! Often times, a sheet of paper would make its way to the Acquisitions staff that contained only the title of the video and the price. Sometimes orders were submitted through email, sometimes through phone calls, most of the time on pink cards (purchase request forms). When a sheet of paper with 100 titles requested for purchase was misplaced by an Acquisitions staff member, we knew we had a problem. There had to be a better way to place and track the orders for our Media department.

The Acquisitions department, in partnership with Reserves, had already developed an in-house system to track reserves requests. A staff member in Circulation had knowledge of Microsoft Access and became the architect of a system that was called RAD (Reserves Access Database). The Reserves department within our library is a distinct collection and has its own budget. It lent itself well to being tracked by a unique system. RAD solved several problems for Acquisitions. It eliminated redundant requests, consolidated requests in one place, and improved order-tracking capabilities.

When the problems with MS came to a head, we decided to adapt the RAD system to accommodate MS ordering. Adjustments were made to create RMAD (Reserves and Media Access Database). RMAD could address several problems that were unique to media ordering. That is, hundreds of orders were placed each month, the order lists lacked crucial information, orders were often duplicated or lost, it was impossible to track the orders, and reams and reams of paper were produced.

The Information

We wanted to make media ordering streamlined and eliminate the boxes of paper that were used each month for printouts from OCLC, the catalog, and vendor Websites. Using RMAD, orders were now consolidated into one place and the workflow was made transparent and paperless across departments. A note field was added to RMAD so information could be shared and a question status was added to alert the Media Librarian of ordering snags, such as a DVD not being available for institutional purchase. RMAD made it easy to archive information and keep ordering history. Since the process was now automated, there were no more handwritten notes or handwritten purchase orders, and anyone could locate and track each purchase request.

The Players

Media Librarian
Acquisitions Data Management Specialist
Acquisitions Librarian/Acquisitions Coordinator (both have the authority to use a purchasing card for orders)
Acquisitions Specialist
Visual Media Collections Coordinator
Media Services Specialist
Cataloger

The Ordering Process

1. Within RMAD, the Media Librarian enters the order information into an electronic form. He includes the title, distributor/producer, year, format, vendor, cost, fund code to charge the order and a note if needed to the Acquisitions Data Management Specialist (such as if the order is a rush or duplicate). The request is then routed, via a drop-down menu, to the For Purchase queue. Each queue in the drop-down menu represents a workflow that may involve multiple departments.

2. The Acquisitions Data Management Specialist checks the For Purchase queue every day for new orders. He researches where to purchase the item and enters in the exact URL for the item from the vendor’s Website into the notes field. This ensures that the correct item will be purchased. He downloads the OCLC record into the catalog (or creates a dummy record if no OCLC record exists) and adds the OCLC number to the order form. He creates a corresponding purchase order in our ILS system. The notes field is also used if a question arises about the order. The question will be put into the notes field and then routed to the Question queue for the Media Librarian to review.

3. The Acquisitions Data Management Specialist will route those titles that are being ordered by the Acquisitions Librarian (or the Acquisitions Coordinator) to the For Stacey (or Alexandra) queue. He will send an email alerting the Acquisitions Librarian or Acquisitions Coordinator to orders that are ready. There are some vendors that the Acquisitions Data Management Specialist will order from directly, such as Midwest Tapes.

4. The Acquisitions Librarian or Acquisitions Coordinator (they share the ordering duties) will access the appropriate queue and copy and paste the URL in a browser to find the exact item. They will place the order using a purchasing card. Once an order is placed, the title is routed to the Ordered queue.

5. When the title arrives in the library, the Acquisitions Specialist quality-checks the item to make sure it is the one that was ordered, finds the order in RMAD and routes the title to the Sent to Tech Check queue.

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6. The title is placed in an area in the Acquisitions department for MS. The Visual Media Collections Coordinator checks every day for new titles to pick up. It is her responsibility to check each video to make sure it works. The title is either routed in RMAD to Tech Passed or Tech Failed. If it’s in the failed queue, the DVD is usually returned to Acquisitions to be returned to the vendor (this rarely happens). For those titles that pass, the following details are added to the Tech Notes field:
- Assigned call number
- Country of production
- Closed captioning/subtitle information
- If item is PAL and needs special playback equipment
- If item is a burned DVD-R
- Public performance rights status
- Any additional notes relevant to the Media Services Specialist when cataloging and considering circulation of the item (i.e. if this replaced a VHS and the VHS is now going to storage).

7. Those titles that are in the Tech Passed queue are then received in Voyager by the Acquisitions Specialist and non-credit card orders are invoiced. The title is then routed to the Paid queue in RMAD.

8. The Media Services Specialist catalogs the titles that are in the Paid queue and changes the queue to OCLC updated/final. He also updates our holdings in OCLC.

9. Sometimes a DVD will need original cataloging and will be sent to the Cataloging department instead of handled by the MS staff. In this case, the title is routed to the Original Cataloging queue.

Both Sides Now: Vendors and Librarians — When Is A Trade Show Not A Trade Show?

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Virtually every industry is aligned with one or more associations that organize and sponsor an annual trade show. Moreover, many of those associations will sponsor even more localized shows throughout the year so as to interest their members to attend the local meetings since they may not have the wherewithal to travel and/or have the necessary funding to attend the larger and more expensive annual meeting.

All vendors like well attended trade shows and conversely intensely dislike poorly attended ones. It’s all about the company’s ROI since the more people that visit the vendors’ booth, the better the odds are of making more sales and even more importantly, interacting directly with more customers and prospects. A customer/prospect who is absent from a Trade Show is an opportunity missed, for both parties.

Associations encourage their members to attend local and/or national trade shows because where else can these people interact with all the important vendors within their industry vertical? It seems quite simple that the ability to compare prices, products, salespeople, etc. of various companies in one day is preferable to having the sales reps from a variety of companies travel to the library over a period of many days. Furthermore, senior executive staff will inevitably be at the trade show booth to meet and greet. Sure would make sense to speak to the CEO, President and/or VP of Sales individually and collectively from the company to discuss whatever topics are on the customers’ minds at the show.

Yet, many trade shows in the information industry are struggling with attendance which is not beneficial for vendor or attendee alike. When these struggles continue, a trade show booth becomes a seemingly deserted island in a lonely exhibit hall and passes from being a productive meeting to a non-existent one. That’s when the dreaded “Not a Trade Show” rears its ugly head.

The tell-tale signs of a “Not Trade Show” are when aisles at the exhibit hall are devoid of attendees. It’s the old bowling ball routine which says that if you rolled a bowling ball down an aisle of a trade show and avoid hitting anyone with it, then that show is useless. Or if you see groups of salespeople aimlessly talking to one another at their booth, then that qualifies as “Not a Trade Show” as well. And when a Trade Show Is Really Not a Trade Show, that morphs into a waste of time and money for exhibitors and attendees.

What causes this phenomenon to happen? Who bears the burden of blame? Actually the association, the vendors and the attendees have to take some degree of responsibility when the trade show ceases to be productive for one or two or all three parties.

In my 30+ years of being an active participant at trade shows both as a vendor and an attendee, I have seen the good, the bad and the ugly. On the vendor side, I have seen sales reps...
literally snoozing at their booth. I have seen them eating and drinking an assortment of food items, even spilling some of the remnants of that food on their clothing. I have seen reps too engaged in conversation with one another while failing to connect with customers as qualified prospects walk on by. The attendees may have been prompted to ask a question or two, but they choose to be polite not wanting to disturb the internal salesperson’s incredibly important conversation. I have seen reps with their backs to the audience. I have seen reps making personal phone calls, and the list goes on and on and on.

On the attendee side, I have had visitors to the booth just wanting to stock their bag with the company’s give-aways. “Ooh, you guys have the BEST sticky pads. Can I have a bunch for the people back at the library?” “Sure” says the rep. “I’d like to share with you information about our latest database offering.” “Hmm, not right now; I’ll be back later” is sometimes the response. Unless the sale rep makes a concerted effort to schedule a time and date later in the conference, “later” usually never happens. I have seen attendees wander aimlessly through the exhibit hall without having a prior plan as to which vendors are needed to be seen. And I have seen associations make it as difficult as possible for their members to visit the exhibit hall.

Much like the buying and selling process, in order for all parties to achieve, even a modicum of success trade show participation has to be a joint effort. What this means is that just showing up at the exhibit hall by both the vendor and the attendee is simply not enough. So, what do the vendor, attendee, and association have to do to make the trade show a success?

Vendor

First and foremost, the question of “why are we going?” needs to be answered. And once the company has made the decision to attend, then that rationale must be passed on to the sales staff. Secondly, besides the sales staff, who from the company is attending to support the sales effort and what is each person’s role at the show? Furthermore, how many on-site appointments are the salespeople expected to have? And finally, what are the goals and objectives for the staff attending so as to understand the metrics of expectations as results are analyzed after the show?

For example, the company might say, “We are attending the annual association conference in Denver from July 6-8 this year. Our main goal is to introduce our newest database product. Only the salespeople from the Western District will be there. That would be Chris, Marian and Kevin. Supporting their efforts will be Marge from marketing, Tom the VP of Sales. Murray, the President of our company is expected to be there on July 7th. A pre-show mailer will be sent 90 days in advance of the show to every registered attendee. That will be followed up with another email blast 30 days prior to the show offering each attendee to be entered in a drawing for a $50 gift certificate for listening to the details of our new database product at the booth. Each salesperson will be expected to make a minimum of three appointments at the booth with customers and/or prospects and should include the Marketing Director and/or VP of sales as often as possible at those meetings. Murray has expressed an interest to see some key clients, as well. Finally, our main goal is to reach as wide an audience as possible to show our new product to the industry.

In one brief paragraph, the company has set the guidelines. WHY are we going? WHO will be there; WHAT will we be doing there; and most importantly, THESE are the expected goals and objectives. The bottom line is that somewhere in the deep recesses of the company’s accounting department, someone has prepared a report for Murray outlining all the costs associated with attending the meeting in Denver. It had better be a profitable show or else Murray will have to explain why not to some unsympathetic investors or members of the board of directors.

Attendees

Whatever industry specialization your library may be, the organization for which you work expects that attending a trade show is not only an extension of your work day, but also a vehicle by which new products, technologies and ideas are brought back to the library. Of course, your management knows that there will be a bit of sightseeing, vendor dinners and receptions, and a fair amount of lounging, but the intent of paying travel expenses to attend the show should result in a positive outcome for the organization. Therefore, what can be done to ensure that the attendee not only sees and interacts with a specified amount of vendors, but also makes time to see some sights in the host city, attend some vendor receptions, speak to authors of books relevant to the profession, and gain new understanding of relevant products and technologies?

All associations inevitably send out a pre-conference mailer detailing the sessions, keynote speaker and of course, the vendors attending. Not only are the vendors listed, but their booths and locations are clearly spelled out. At this point, it’s essential that an individual roadmap for the attendee be created. I want to see vendors A, B and C. A is on aisle 109, B is on 112, and C is the first booth as I enter the exhibit hall. OK, now I know where my main vendors are located. Creating this roadmap will ensure that all three are visited. Add to the map any other vendor locations and that completes the first step.

Making specified appointments with key vendors supplying the library is also an essential of successful trade show attendance. If the sales rep has not reached out to you, then it is incumbent upon you to reach out to them and schedule a specific time and date to meet with the company. Moreover, you can request that a person from marketing, product management, training, executive staff, etc. be present at the meeting. Whether it is to compliment your sales rep, inquire about a new product or voice concern over an issue, making the appointment will go a long way for the company to attentively answer your questions.

Upon returning back from those three days in Denver, the attendee must take the time to write a report to management as to what was learned at the show. Why was it important for me to attend? What benefit for our organization was derived by being there? How can that new knowledge be applied to our library? In other words, management must be made aware of why it is important to attend. Too many times, information professionals tell me that they cannot attend an upcoming show because their management has reduced the funding needed to attend. To counter this, management has to be made aware of how attending will benefit the organization. However, if you don’t tell them, they won’t know.

Associations

The third leg of this three-legged stool is the organization, itself. What is the organization doing to make it as easy as possible to exhibit for vendors and make it as easy as possible for the association members to attend?

To keep the vendors satisfied and returning year after year is quite simply to provide a well lit, well ventilated exhibit hall held in a city that the membership can easily travel to and stay at hotels with somewhat reasonable room rates. Moreover, the association needs to assist the vendors in reaching a wide audience of membership through mailings and email blasts expounding on the benefits of why the show is the “latest and greatest.” Booth space rental rates, Internet connections, and freight charges should be held to a reasonable $ rate so as to interest as many vendors as possible to attend. Providing statistics, offering a multi-year commitment at a discounted rate, creating an “exhibits only” time for attendees each day of the show will go a long way to bringing vendor and information professionals closer together.

Recently, while attending an information industry trade show, I spoke to an exhibitor who was bemoaning the lack of qualified prospects passing by his booth. He told me that this was his last year attending and went on to say that the all trade shows in all industries are suffering declining attendance.

There is an organization called the Center for Exhibition Industry Research www.ceir.org. The CEIR Mission: CEIR provides industry-leading research on the North American exhibitions and events industry globally which optimizes performance, increases engagement, and addresses emerging customer needs. In looking at some of their statistics, many association trade shows are showing significant growth and popularity. One only has to look at the Charleston Conference that has enjoyed significant growth and contains the blueprint of how a trade show can be successful. CEIR provides statistics that point out that trade show attendance in certain industries is increasing.

In thinking about what song title best exemplifies what a successful trade show experience should be for both the vendor and attendee, the answer was quite clear. “It Takes Two to Tango” written by Al Hoffman and Dick Manning was recorded both by musical greats, continued on page 79
Washington D.C.’s Museum of Science Fiction (MOSF) published the first issue of its new scholarly journal in January.1 The MOSF Journal of Science Fiction is available online for free download in PDF format. Content is available under a Creative Commons Attribution 3.0 Unported license. Each peer-reviewed article begins with an abstract and list of keywords. The journal’s editorial board includes scholars Rachel Lazarus, Heather McHale, and Barbara Jasny (also Deputy Editor of Science), as well as prominent sci-fi authors Nancy Kress (Yesterday’s Kin, Beggars in Spain) and Ben Bova (Orion, Mars).2

The prospect of creating an academic journal for the Museum of Science Fiction filled me with elation and trepidation. My months of research and planning would be for naught if I couldn’t assemble the necessary teams of editors, peer reviewers, and — most importantly — authors who would breathe life into the MOSF Journal of Science Fiction. My vision was — and still is — not to replace the other well-established academic journals of science fiction studies that already exist, but to complement them.2

Introductions to the journal are furthered with reflections on the nature and importance of Science Fiction from Science Fiction Studies editor Veronica Hollinger and Science Fiction Research Association Pioneer Award winner Allison de Fren. The articles in the inaugural issue are indeed widely varied and deliciously well grounded in critical theory. It is wonderful to see references that list not only the likes of Herbert and Zelazny but also Derrida and Marx. It’s hard to beat a table of contents that includes titles like these:

“Biogenetics, The Nation, and Globalization in Paolo Bacigalupi’s Critical Dystopias” by Derrick King

“Gods of War Toke While Riding a Vimana: Hindu Gods in Three Indian Science Fiction Novels” by Sami Ahmad Khan4

“Loving the Other in Science Fiction by Women” by Karma Waltonen

“Paul’s Empire: Imperialism and Assemblage Theory in Frank Herbert’s Dune” by Amanda Rudd5

The collection is not only well rooted in Sci Fi’s past but quite contemporary, even prescient, as befits the genre. King’s exploration of the complex trappings of globalization, Neoliberalism, climate catastrophe, and the perils of privatization in Bacigalupi could almost come from 2016 U.S. election headlines (if we actually discussed issues instead of theatrics, but I digress). Waltonen’s discussion of the dynamics of sex and power in the works of Octavia Butler, Marge Piercy, and others is also riveting, and is tagged with “inter-species sex” as a keyword. Khan’s study of the representation of Hindu gods in English-language Indian works is extremely interesting. Plus, it contains subheadings like “Flying Saucers Battle Al Qaeda: Hindu Gods as Ancient Astronauts” and “Stoned Gods versus Brain-dead Zombies.”6 Are you reading this? Why aren’t you reading this?

You could even be writing this, if you have the chops. The journal invites submissions of 5,000 to 8,000 words, plus a 150-200 word abstract, via its Website: http://publish.lib.umd.edu/scifi/about/submissions/onlineSubmissions.

But get on that. Louzon notes in her introduction to this first issue that, “we are thrilled to say we already have many more manuscripts under consideration for our next issue.”6 I can’t wait to read them.

Endnotes


6. MOSF Journal of Science Fiction.

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Pearl Bailey and Louis Armstrong in 1952. It was a bestselling song that was not about trade shows, but it sure was about two parties getting together and after all, isn’t that what trade shows are all about? 💾

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Against the Grain / April 2016
I was recently reflecting back on the first six months of my new role at The University of Alabama. I was charged during the first year to undertake a complete review of work processes within the newly formed Resource Acquisition & Discovery Department. The previously separate functional areas of acquisitions, cataloging, and electronic resources were brought together just prior to my start in August of 2015. The analysis began within the first couple of months as I began to meet with everyone in the department. We discussed the usual things including what was going well and what could be improved. I learned about the transition period after the loss of department and unit heads over the previous year or two, and understood how the staff now had to face the uncertainty of a new manager. It became apparent that bringing the units together in proximity did not necessarily mean that there would be a logical move toward integration of workflow. Being Earnest with Collections focuses this month on raising awareness of the importance of workflow analysis. Hopefully I will provide some best practices for others who plan to take a good hard look at just where technical services is going. There is a new emphasis on moving away from traditional models of collection building and toward a focus on collection strategy, in line with providing content when and where it is needed rather than building collections across all disciplines. There is an opportunity to be more efficient while we transition spending and staffing from a traditional print based operation to one that will be able to address selection, procurement and access in the electronic environment.

Workflow — An Idea Becomes Reality

The workflow analysis in the newly formed Resource Acquisition & Discovery Department at The University of Alabama began with discussions between Dr. Millie Jackson, Associate Dean for Research & Instruction and myself early in my tenure. We discussed how changes in staffing, and particularly the loss of key faculty librarian positions had left many questions about the current amount and complexity of the work that remained in the traditional technical service areas of acquisitions, serials, cataloging and gifts. Questions had surfaced about the need to continue providing some of the services that were traditionally handled while focusing more training and staff time on managing procurement and discovery for electronic resources. We were both interested in learning just how the work moved through the various areas within the department from the starting point until the materials were sent out of the department. Workflow analysis can be a lengthy process. It is important to undertake such an endeavor for the right reasons and to establish goals for the project.

When is a Workflow Analysis Necessary?

- When a department head position has been vacant for an extended period of time
- During a time when there are several vacancies or shortly after filling vacancies
- After a retirement or departure of long term employees in key roles
- Following a merger of units or functional areas
- In conjunction with library or university strategic planning
- As part of a larger library initiative to pursue a new direction
- If it has been several years since the last analysis

After a decision is made to go forth it is important to develop initial goals for the workflow project. The workflow analysis will not answer every question. I tend not to focus on policies and procedures during this process and rather stick to identifying where problems develop as work moves through the department. Though during the process there will no doubt be times when problems are identified that bring the discussion around to policies and procedures. It is my feeling however that trying to include these areas in a review of workflow will get individuals mired down in trying to document complex operations in charts that are designed to be linear. We often talk about finding bottlenecks and searching for single points of failure where workflow goes through one individual who does not have a backup. These types of issues are easier to spot when just focusing on the transition of work throughout the department. For the current project we were in search of new efficiencies and eager to find out if a complete and lengthy workflow analysis would help achieve a number of goals. Provided here are the major goals we wanted to address.

- Highlight current strengths
- Identify areas for improvement
- Provide clear pathways for better integration between the formerly separate departments/units
- Provide faster delivery of content to library users
- Improve discoverability through better quality control in Cataloging and Electronic Resources
- Determine appropriate staffing levels
- Pinpoint areas for training
- Eliminate unnecessary legacy duties
- Develop new roles for the department
- Establish goals for the new department that align with library wide goals

With goals established the next hurdle is getting buy-in from the members of your team.

Building Support within your Team

I was not always a fan of workflow analysis. I recall when I managed my first workflow analysis at Old Dominion University (ODU) I was reluctant to take on such a project. I was of the mind that workflow analysis was a waste of time. Luckily I had a couple of colleagues to help me through it. The results were positive and resulted in enhancements to operations and major changes to staffing. I, along with a colleague from ODU, highlighted the process and results in an article in Serials Review and later during a presentation at the Charleston Conference. A similar process at the University of Central Florida a couple of years later built the foundation for how operations were handled there for the next several years. With this in mind I set out to convince the librarians and staff at The University of Alabama of the value of workflow analysis.

Keys to Successful Workflow Analysis

I have found that upon hearing of a workflow analysis project the natural reaction is to question why it is necessary. Usually a number of the staff have been through one or more in the past, and have found them to be onerous. Their experience may have been that there is little follow-up after the project or nothing changes as a result. When you add in turnover at the management level and the impact of changing user expectations and new directions in the publishing and scholarly communication landscape I think it is understandable that librarians and staff will feel as though a workflow analysis will just take them away from their duties during a time when they are already feeling the impact of staff reductions and ever changing responsibilities.

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In effort to address these concerns it is recommended that librarians and staff at all levels within the department be brought in early to discuss the project and begin to build as much support as possible. In order to do this I like to have a department meeting where the following points are covered.

- Encourage staff at all levels to actively participate
- Show examples of successful workflow charts
- Stress that recommendations will be made following the project
- Focus on identifying strengths and areas for improvement
- The analysis is focused on functional areas not individuals
- Prep everyone that the result may be a change in priorities
- Aim for integration of workflow – units working together to address problems
- Final project is workflow charts with analysis and recommendations

The success of any workflow project is tied to the level of motivation and active participation by the team. To that end it is important to include staff at all levels as much as possible from the beginning. Staff should be given examples of workflow charts and, if available, evidence of analysis and how it was previously used to influence positive change. When the project began here at The University of Alabama I provided the team with a copy of the 2006 Serials Review article I co-wrote about our project at ODU so they could see charts and highlights from a project that produced positive results.

**Successfully Managing the Process**

During the development of workflow charts I have found it to be advantageous to meet with either individuals or units depending on the type of work being performed. Before the first meeting to begin the chart process it is important to determine how the charts will be developed. They can be drafted on flip charts which often promotes brain storming and then one person is assigned to build the charts using a product like Visio. I have also tried leading a discussion so I can ask questions and really get into the current process. This can result in a combination of notes and charts that are useful during the analysis phase. Some people will choose to do the charting where they have access to Visio and instead of spending time doing them the old way, the charts are done electronically from the start. However, I have found that the process of actually building the charts often results in many changes along the way and some will find it easier to build them the old fashioned way on flip charts and then go to a computer later. Another step I have found helpful is using a systematic way to identify on the charts examples of where work within the department is held up while someone waits on decisions or processes outside the department. I often use background colors to provide clarity. I also add notes in each chart that reflect issues or concerns that were brought up during the discussion phase. These often form the basis for making recommendations to enhance efficiency, to explore the elimination of existing processes, and to identify potential new services.

The focus of this article was to provide some best practices that can be used to help make the workflow analysis project run smoothly with positive results that meet the initial goals and objectives. The project just completed at The University of Alabama resulted in several internal changes, better integration between the units and recommendations for new services that will help shape the role of Resource Acquisition & Discovery as we move forward with strategic planning at the university and library level. When we think of being earnest with collections that tends to bring up discussions about spending less and looking for ways to maximize the materials budget. I hope that this column will bring attention to the importance of being efficient within traditional technical services operations. Eliminating unnecessary work, being more efficient at what we do, and adding new and exciting roles for technical services contributes to being earnest with collections.
Wandering the Web — Laws that Affect the Life of Americans from Slavery to the 21st Century

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Author’s Note: Part One of the bibliography is a list of Websites where information concerns laws and cases that greatly impacted African American lives in the nineteenth century. These laws are listed chronologically beginning at slave codes to Plessy v. Ferguson. The slave codes and fugitive slave laws were meant to control the possibility of slave rebellion. As the History Channel stated, black codes and the Jim Crow laws were meant to maintain white supremacy and Southern agricultural society. The Dred Scott decision declared African Americans were not citizens. Plessy made segregation the law of the land. Laws, such as the Civil Rights Acts and Voting Rights Act, demanded that the United States government honor the Constitution, particularly the Fourteenth Amendment — “all persons born or naturalized in the United States” are citizens and “...forbids states from denying any person life, liberty or property without due process of law” or “deny to any person within its jurisdiction the equal protection of the laws.”

Part Two lists Websites of laws that attempted to reserve the centuries of oppression. These laws illustrate the small gains African Americans made to obtain de facto freedom. — ARN

Slave Codes

The U.S. History.org — http://www.history.org/us/6f.asp — owned by Independence Hall Association of Philadelphia, provides the definition and rationale for slave codes. Slave codes were not implemented in the South in the 1800s, but it existed in the colonies in the 1700s. U.S. History.org states slave codes were employed to control the movement of slaves in order to avoid rebellion.

At the top of the page is a drop-down menu, which provides various aspects of United States history. The subtitle of the page is “African Americans in the British New World.” The section for slave codes is label as “6F. African Americans.” The subsection “f” is where slave codes are located. The left side of the page includes further information on slave codes on other sites.

The American Treasures of the Library of Congress: Memory — http://www.loc.gov/exhibits/treasures/trm009.html — maintained by the Library of Congress (LOC), is a Website about slave codes in the District of Columbia (DC). To the left of the page is an image of the actual slave code passed in D.C.

Fugitive Slave Laws


The site succinctly states the North and South’s views on slavery and the recapture of slaves. The varying views caused division between the two regions. According to LeFrancois, the “Fugitive Slave Act of 1793” was an effort to provide a means to enforce the constitutional clause concerning escaped slaves. “The act allowed a slave owner to seize an escaped slave and present him/her before a federal or local judge, and, upon ownership, receive a certificate authorizing the slave to be retaken.”

LeFrancois maintains that the “Fugitive Slave Act of 1850” “was an important part of the Compromise of 1850.” The Compromise was an attempt to avoid the divide between the North and the South that was to occur. LeFrancois summarized the aspects under the 1850 act that made the recapture of slaves easier and the successful escape nearly impossible. He points out “federal marshals were financially liable for not trying to execute the warrants and for allowing fugitives to escape. Penalties were increased for obstructing slave owners or helping fugitives, and included imprisonment.” LeFrancois states under “an Unsuccessful Accommodation” section the Compromise merely “illustrated the North’s and South’s opposing views on the issue of slavery.” The last section is a debate about whether reparations should be paid to African Americans as the result of slavery. Although an interesting debate, it seems out of place in the discussion of the Compromises.

The History Channel Website — http://www.history.com/topics/black-history/fugitive-slave-acts — entitled “Fugitive Slave Acts” begins with a dramatic banner “The Slave-hunter is among us. Be on Your Guard. An arrest is planned for to-night (sic).” It summarizes the Fugitive Slave acts and circumstances they were enacted. In addition, the Website notes that statutes regarding runaway slaves were in the thirteen colonies as early as 1643.

Fugitive Slave Law of 1793

U.S. History.org — http://www.history.org/presidentshouse/history/slaveact1793.htm — created a Website for the fugitive slave acts. The title of the Website is “The President’s House in Philadelphia: Fugitive Slave Act of 1793.” The Website consists of the entire document of the Fugitive Slave act. In the “Fugitive Slave Act of 1793,” in order to force a person back into slavery, the burden of proof was on the person making the charge. Section Two states “if any person takes a slave or aids in the escaping of the slave shall be fined five hundred dollars and up to a year in prison.” A slave owner’s word or a document before the judge was sufficient to provide the proof that a person should be returned to slavery.

WGBH New England PBS channel — http://www.pbs.org/wgbh/iaia/part2/2h62.html — aired a series called “Africans in America.” The Website, “Africans in America: Revolution, Fugitive Slave Act of 1793.” This Website is a continuation of the program. The site quotes Article IV, Section 2 of the Constitution: “any person held to service or labor” can be returned to the owner. PBS points out the Constitution does not say a slave. Additionally, continued on page 83
the slave law allowed any official the power to seize a slave and return him/her to bondage.

**Fugitive Slave Law of 1850**

The part four PBS series [http://www.pbs.org/wgbh/aia/part4/4p2931.html](http://www.pbs.org/wgbh/aia/part4/4p2931.html) — entitled “Africans in America: Judgment Day, 1831-1865,” included the Compromise of 1850 and Fugitive Slave Act. This Website discusses the events that led up to the passage of the “Fugitive Slave Act of 1850.” The passage of the law was connected to the Compromise. According to the Website, several issues could have split the Union quicker than it did. For example, questions such as whether Mexico and California enter the Union as free or slave states and was Santa Fe a part of the Texas territory as Texan officials claimed? Additionally, Washington, D.C., the Union’s capital, allowed slavery and the selling of slaves, which “was the largest slave market in North America.” In order to forgo the inevitability of the division of the Union, a compromise was made. As a part of the Compromise of 1850, the “Fugitive Slave Act of 1850” was introduced, which was one of the agreements to keep the Union intact.

**NFLC**

— [http://www.nbcnews.com/id/24714472/ns/us-news-gut-check/ss-expansion-slavery-us/v/CvyrfrRHg](http://www.nbcnews.com/id/24714472/ns/us-news-gut-check/ss-expansion-slavery-us/v/CvyrfrRHg) — created a series called “Gut Check, America.” Gut Check America was created to “ask...readers...what matters most to [them].” Then use the responses to help inform [the] coverage of the topic.” The Website entitled “1800-1850s: Expansion of Slavery in the U.S.” is a part of this series. The site includes the rationale of the Compromise of 1820 and 1850. These compromises were created to settle a dispute between the Northern and Southern states as to whether a state would enter the Union as a free or a slave state. The American Anthropological Association (AAA), the providers of information on the Website, state the Compromise of 1850 created the “Fugitive Slave Act of 1850.” According to AAA, the act was the most devastating legislation to slaves and abolished it. The act required anyone could capture a slave and return him/her to slavery. The slave did not have due process; therefore, they could be returned without a trial. As a result, free blacks could be forced into slavery. This act caused 20,000 African Americans to flee from the United States to Canada.

**Lillian Goldman Law Library of Yale Law School** — [http://avalon.law.yale.edu/19th_century/fugitive.asp](http://avalon.law.yale.edu/19th_century/fugitive.asp) — created the “Avalon Project: Documents in Law, History and Diplomacy.” Avalon’s purpose is to provide digital documents, which covers the topics of law, history diplomacy, politics, and diplomacy.

The Avalon Project provided the entire ten sections of the Fugitive Slave Act. To summarize two parts of the law that different from the “Fugitive Slave Act of 1793” and to illustrate how this act significantly inhibited slaves’ attempts towards freedom, Sections Five and Six will be mentioned. Section Five “...should any marshal or deputy marshal refuse to receive such warrant or other process when tendered or to use all proper means diligently to execute he shall on conviction thereof, be fined in the sum of one thousand dollars.” In the “Fugitive Slave Act of 1793,” the fine was five hundred dollars. In addition, if a fugitive escape under an officer’s control, that officer will be prosecuted “for the full value of the service or labor of said fugitive.” In this act, unlike the previous one, the slave catcher is responsible for the successful return of the slave. Section Five allows “posses committatus” or “all good citizens” to return slaves to their owners.

Section Six states that the owner can pursue the slave by obtaining a warrant “to seize the fugitive without process,” and the owner could proclaim by deposition, orally or in writing, to certify the slave belongs to him.

**Black Codes**

PBS — [http://www.pbs.org/pt/slavery-by-another-name/themes/black-codes/](http://www.pbs.org/pt/slavery-by-another-name/themes/black-codes/) — created a Website about black codes and pig laws. The Website includes videos on both codes. A pig law was a penalty, a misdemeanor, or, and a felony solely levied against African Americans when a farm/agricultural crime occurred. These pig laws stayed on the books well into the Jim Crow era.

According to the History Channel — [http://www.history.com/topics/black-history/passage-of-the-black-codes](http://www.history.com/topics/black-history/passage-of-the-black-codes) — created an online library of historical documents called “Missouri Digital Heritage.” The title of the Website is “Missouri State Archives, Missouri’s Dred Scott Case: 1846-1857.” The Dred Scott case began in St. Louis Circuit Court. Therefore, many of the detail regarding the case and the personal lives of Scott’s family and owners may be discussed in greater detail than elsewhere. According to the Website, Scott case began from “an 1846 action when Dred Scott innocently made his mark with an ‘X’ signing his petition in a pro forma freedom suit, initiated under Missouri to sue for freedom in St. Louis Circuit Court.”

**Jim Crow Laws**

The National Park Service (NPS) — [http://www.nps.gov/malu/learn/education/jim_crow_laws.htm](http://www.nps.gov/malu/learn/education/jim_crow_laws.htm) — which is a government entity under the United States Department of the Interior, created a Website about Jim Crow Laws. The title of the Website, “Martin Luther King, Jr: National Historic Site-Georgia,” is misleading. However, the topic is about Jim Crow laws. This page discusses the Jim Crow laws in different states. Jim Crow laws are like the slave and black codes. These laws were designed to limit the African American’s every-day life after he achieved freedom from slavery. For example, Mississippi had a law against the promotion of equality, i.e., “any person...in favor of social equality or of intermarriage between whites and negroes, shall be subject to fines not exceeding five hundred (500.00) dollars or imprisonment not exceeding six (6) months or both.”

**The Ferris State University in Big Rapids, Michigan** — [http://www.ferris.edu/jimcrow/what.htm](http://www.ferris.edu/jimcrow/what.htm) — created the Jim Crow Museum of Memorabilia. The Webpage features a slide show of some of the museum’s artifacts, which are very disturbing. However, the menu tab, “About us” and under the section “About the Museum,” the goal of the museum is “to get people to think deeply” and show the alarming artifacts of history of racism in the U.S.” By clicking on the “video” tab, various YouTube videos on racism are available for viewing.

The Library of Congress (LOC) — [http://www.loc.gov/teachers/classroommaterials/primarysourcesets/civil-rights/](http://www.loc.gov/teachers/classroommaterials/primarysourcesets/civil-rights/) — created a teachers’ guide of primary sources and images of Jim Crow laws and segregation. The content can be filtered based upon Common Core Standards, state content, grade level, and subject. For example, an educator can select “Common Core Standards in grade level twelve for the subject of social studies. Once the selection has been made, a list appears with the standards the content fulfills.

**Dred Scott v. Sanford (1857)**

Dred Scott, a slave, argued for his freedom before the United States Supreme Court in 1857. According to the majority opinion of the court, slaves and Blacks were not citizens, therefore, could not bring their cases before a federal court.


**Missouri Office of the Secretary of State et al** — [https://www.sos.mo.gov/archives/resources/africanamerican/scott.scott.asp](https://www.sos.mo.gov/archives/resources/africanamerican/scott.scott.asp) — created an online library of historical documents called “Missouri Digital Heritage.” The title of the Website is “Missouri State Archives, Missouri’s Dred Scott Case: 1846-1857.” The Dred Scott case began in St. Louis Circuit Court. Therefore, many of the detail regarding the case and the personal lives of Scott’s family and owners may be discussed in greater detail than elsewhere. According to the Website, Scott case began from “an 1846 action when Dred Scott innocently made his mark with an ‘X’ signing his petition in a pro forma freedom suit, initiated under Missouri to sue for freedom in St. Louis Circuit Court.”

The Library of Congress (LOC) — [http://www.loc.gov/rr/program/bib/ourdocs/DredScott.html](http://www.loc.gov/rr/program/bib/ourdocs/DredScott.html) — created an online reference guide called “Web Guides: Virtual Services Division Reference Service.” The title of the page is “Primary Documents in American History: Dred Scott v. Sanford.” LOC briefly is divided by six sections, for example “Digital Collections,” “Chronicling,” and “Younger Readers,” etc. This page is a great resource
to find other types of information on the Dread Scott decision.

**Plessy v. Ferguson (1896)**

History Channel — [http://www.history.com/topics/black-history/plessy-v-ferguson](http://www.history.com/topics/black-history/plessy-v-ferguson) — summarized the details regarding Plessy v. Ferguson (1896). In this landmark case, Homer Plessy refused to sit in a separate railway car in Louisiana. He argued that his civil rights were violated. The seven majority panel believed that Plessy’s civil rights were not violated if the accommodations were “separate, but equal.” As a result, Plessy v. Ferguson set the precedent of segregation in every aspect of African Americans’ lives.

**WNET Indianapolis, Indiana PBS channel** — [http://www.pbs.org/wnet/jimcrow/stories_events/plessy.html](http://www.pbs.org/wnet/jimcrow/stories_events/plessy.html) — televised a series in 2002 titled the “Rise and Fall of Jim Crow.” Under “About the Series” link described “Rise and Fall of Jim Crow” as a “landmark four-part series [that] explores segregation from the end of Civil War to the dawn of the modern Civil Rights movement.” A Website was created to summarize the various aspects of the series. The Plessy v. Ferguson (1896), a United States Supreme Court case that created de jure of segregation, in spite of the Fourteenth Amendment.

**Legal Information Institute** — [https://www.law.cornell.edu/supremecourt/text/163/537](https://www.law.cornell.edu/supremecourt/text/163/537) — which is housed at Cornell University Law School, provided the entire Plessy v. Ferguson case, including the opinion of the court and lone dissenter, Justice John Harlan. The opinion of the Court made Justice Brown stated that “all railway companies carrying passengers in their coaches in this State shall provide equal but separate accommodations for the white and colored races by providing two or more passenger coaches for each passenger train.” Justice John Harlan, as the sole dissenter, rebuked the ruling due to “such legislation as that here in question is inconsistent not only with that equality of rights which pertains to citizenship, National and State, but with the personal liberty enjoyed by everyone within the United States.”

**Part 2 of Laws**

The following laws illustrate a shift towards de facto freedom for African Americans. Some scholars believe the Brown v. Board of Education (1954) decision was the beginning of the Civil Rights movement. However, while others contend that 1619, when the first Africans who were sold as slaves to colonists, began the Civil Rights era. No matter the date, the succeeding laws demonstrate African Americans’ collective push towards obtaining their rights under the Constitution.

**Mendez v. Westminster (1945)**

Mendez v. Westminster is not a U.S. Supreme Court case. However, Mendez v. Westminster had an impact on the Brown v. Board of Education Supreme Court ruling.

It set the precedent for desegregated schools. Sylvia Mendez was denied access to a school in California, because she was Latina. Mendez et al argued successfully that denying Mendez entry into the Westminster Elementary School was unconstitutional.*

**Smithsonian National Museum of American History: Behring Center** — [http://americanhistory.si.edu/brown/history/2-battleground/pursuit-equal-2.html](http://americanhistory.si.edu/brown/history/2-battleground/pursuit-equal-2.html) — devoted a Webpage to Brown case entitled “Separate is not equal: Brown v. Board of Education.” The subtitle is “In Pursuit of Equality: Mendez v. Westminster.” As stated in the introduction to this section, Sylvia Mendez et al Westminster Elementary School, because she was not admitted due to her race. Among the arguments made in this case, one of them declared that “separate schools violated the Fourteenth Amendment.” As a result, other courts upheld the decision and California Governor Earl Warren fought to desegregate schools for Asian and Native Americans. This Webpage does not explicitly make the connection with Brown v. Board of Education.

**The Constitutional Rights Foundation’s (CRF)** — [http://www.crf-usa.org/bill-of-rights-in-action/bria-23-2-c-mendez-v-westminster-paving-the-way-to-school-desegregation](http://www.crf-usa.org/bill-of-rights-in-action/bria-23-2-c-mendez-v-westminster-paving-the-way-to-school-desegregation) — mission is to educate young people to be more civic-minded. As a result, the Foundation devoted Website to the Mendez case titled, “Mendez v. Westminster: Paving the Way to School Desegregation.” The Website’s audience is school children, parents, and teachers. Teachers can find free lesson plans on Black history, the Bill of Rights, and the Common Core. The CRF provides background information on the Mendez decision and segregation. In addition, it makes a clear connection between the Mendez and Brown cases. According to CRF, Mendez was “the first time…evidence [presented] in a court that school segregation harmed minority children.”

**National Park Service (NPS)** — [http://www.nps.gov/nr/travel/american_latinoculturalheritage/LosAngeles_US_CourtHouse_and_PostOffice.html](http://www.nps.gov/nr/travel/american_latinoculturalheritage/LosAngeles_US_CourtHouse_and_PostOffice.html) — produced a Webpage to the Mendez case titled “American Latino Heritage: U.S. Court House and Post Office, Los Angeles, California.” NPS included illustrations of the U.S. District Court, Westminster School of Orange County, and Sylvia Mendez receiving her Presidential Medal of Freedom. NPS notes the discriminatory practices of school administrators in regard to Latino Americans, for example, the less “Mexican” a child looked and sound, he/she could attend the white school.

**Brown v. Board of Education (1954)**

According to Kansas state law, cities having more than 15,000 citizens were required to establish a separate school for African American children. In 1950, the Kansas State Supreme court heard eleven court cases that challenged segregated schools. Later in 1950, the NAACP created a class action lawsuit, which represented thirteen families. In February 1951, a federal three-judge panel ruled that segregation “may be detrimental, but not illegal.” In 1954, Thurgood Marshall et al successfully argued the unconstitutionality of segregated schools.

**Legal Information Institute (LII)** — [https://www.law.cornell.edu/supremecourt/text/347/483](https://www.law.cornell.edu/supremecourt/text/347/483) — has the full text of the Brown v Board of Education. Whereas Plessy v. Ferguson made segregation the law of the land, Brown v. Board of Education (1954) made segregation unconstitutional. The syllabus of Brown states “segregation of White and Negro (sic) children in the public schools of a state is a classification on the basis of race, purportant to state laws permitting or requiring such segregation, denies to Negro children the equal protection of the laws guaranteed by the Fourteenth Amendment — even though the physical facilities and other ‘tangible’ factors of white and Negro schools may be equal.”

The Leadership Conference — [http://www.civilrights.org/education/brown/](http://www.civilrights.org/education/brown/) — created a Website about the Brown v. Board of Education Supreme Court ruling. The Leadership Conference on Civil and Human Rights and The Leadership Education Fund “is a coalition charged by its diverse membership of more than 200 national organizations to promote and protect civil and human rights of all persons in the United States.” The Leadership Conference was created by A. Phillip Randolph, head of the Sleeping Car Porters, Roy Wilkins of the NAACP, and Arnold Aronson, a leader of the National Jewish Community Relations Advisory Council. The organization was founded in 1950.

The Brown v Board of Education Website is divided into two sections with eight sections. Under the “Online Resources,” some of the resources include “About the Brown decision,” “Exhibits,” and a student activity booklet for children, and “Resources and Articles.” The majority of the resources and articles are found elsewhere on the Web.

The National Association for the Advancement of Colored People (NAACP) Legal Defense and Educational Fund — [http://www.naacpldf.org/case/brown-v-board-education](http://www.naacpldf.org/case/brown-v-board-education) — was created by Thurgood Marshall, the first African American to serve on the Supreme Court, in 1940. The Legal Defense and Educational Fund (LDF) “is the country’s first and foremost civil and human rights law firm… [Its] victories established the foundations for the civil rights that all Americans enjoy today.”

The LDF created a Website to explain the Brown v. Board of Education case. The title of the Website is “Case: Landmark: Brown v. Board of Education.” On the left side of the page are “Related Files” or cases that are related to the Brown case. Below the related files is “Recent News.” LDF provides information on civil and human right cases.

The National Parks Service (NPS) — [http://www.nps.gov/nr/travel/civilrights/kai1.htm](http://www.nps.gov/nr/travel/civilrights/kai1.htm) — a governmental agency, produced a Website called “We Shall Overcome: Historic Places of the Civil Rights Movement.” The historical places featured were the center of the Brown v. Board of Education case — Monroe continued on page 85
Elementary School and Sumner Elementary School in Topeka, Kansas.

“Brown v. Board of Education National Historic Site is the subject of an online lesson plan produced by Teaching with Historic Places, a National Register program that offers classroom-ready lesson plans on properties listed in the National Register.”

**Civil Rights Laws**

The United States has various Civil Rights laws. The most recognized laws are Civil Rights Acts of 1964 and 1968. Civil Rights Act of 1964 forbade discriminatory practices in aspects of employment. The Civil Rights Act of 1968, also known as the Fair Housing Act of 1968, prohibited discriminatory practices in regards to housing. The following Websites are places on the Internet where these laws can be found.

**FindLaw** — http://civilrights.findlaw.com/enforcing-your-civil-rights/civil-rights-laws.html — which is a Thomson Reuters product, “provides legal information online.”

**HG.org** — http://www.hg.org/civilright.html — is an “online law and government.” HG.org provides background information on the Civil Rights laws. The Website is divided into informative sections such as “Excessive and Police Misconduct” to “Information Civil Rights Lawyer.” Further on the page is information about Civil Rights law. The Civil Rights section is not only civil rights laws in the United States, but international laws as well. At the top menu bar is the “Articles” tab. Once this tab is selected, the articles are listed alphabetically by subject. HG.org has 535 articles about Civil Rights.

The Legal Information Institute (LII) — https://www.law.cornell.edu/wex/civil_rights — is small research engineering and editorial group housed at the Cornell Law School in Ithaca, NY. LII’s collaborators “include publishers, legal scholars, computer scientists, government agencies, and other groups and individuals that promote open access to law worldwide.” LII created WEX, which is a free legal dictionary and encyclopedia.

The encyclopedia defines a civil right as “an enforceable right or privilege which if interfered with by another gives rise to an action for injury.” The Website provides information on civil rights laws.

United States Commission on Civil Rights (CCR) — http://www.usccr.gov/ — is a federal government agency. The CCR was created as a result of the “Civil Rights Act of 1957.” The Civil Rights Act of 1957 fortified the federal government’s commitment to civil rights. CCR was “established as an independent, bipartisan fact-finding federal agency, its mission is to "inform the development of national civil rights policy and enhance enforcement of federal civil rights laws.” The Website is sectioned by highlights, recent reports, recent correspondence, recent congressional reports, and testimony. At the bottom right of the page are recent meeting transcripts.

**Voting Rights Act 1965**

The Leadership Conference Website — http://www.civilrights.org/voting-rights/vra/history.html — included the history and sections as well as the Supreme Court’s relationship to the “Voting Rights Act of 1965” (VRA). According the Website, Section 2 prohibits discriminatory practices of minority voters. Section 5 “requires federal ‘preclearance’ before covered jurisdictions.” The covered jurisdictions have historically discriminated against voters. However, in June 2013 in Shelby County v. Holder the “preclearance” was deemed unconstitutional. This act not only benefitted African Americans, but Asian and Latino Americans were also barred from voting in various places of the United States before the law was enacted.

The United States Department of Justice Civil Rights Division — http://www.justice.gov/crt/about/vot/intro/intro_b.php — has a voting section on its Website. This section includes links of the “History of Federal Voting Rights Laws.” In addition to the history, the Department of Justice provides the “1965 Enactment” of the VRA. According to the site, two events occurred that impacted the passage of VRA, the murder of civil rights activists and the attack by state troopers on peaceful marchers on the Edmund Pettus Bridge in Selma, Alabama. These acts “persuaded...President [Johnson] and Congress to overcome Southern legislators’ resistance to effective voting rights legislation.”

The National Initiative on American History, Civics, and Service — http://www.ourdocuments.gov/doc.php?flash=true&doc=100 — sponsored a Website entitled “Our Documents: 100 Milestone Documents from the National Archives.” The Website is comprised of 100 primary, digitized documents that had an impact on American history. As a result, the actual VRA of 1965 is included as one of the one hundred documents. The date stamp of August 6, 1965 can be seen. The Website noted the purpose of the VRA was to enforce the Fifteenth Amendment, which was to allow everyone the right to vote.

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**Endnotes**

1. https://www.loc.gov/rr/program/bib/ourdocs/14thamendment.html

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firm order and are lucky, your chances of getting the washable edition are very high.)

I drew two lessons from this epic saga. First, the “who knew?” lesson that the physical manufacture of the books we buy nowadays is a far more complicated process than I realized. How many mass market paperbacks sold through Amazon are printed by them in this way? Sure, many readers today get a book in their hands and if they take a moment will sniff at it and grumble about how books aren’t made the way they used to be, but Henry Adams was right, “The world grew cheap, as worlds must.” It’s just bad luck when one of those books falls into the hands of a pig-headed university librarian with time on his hands.

But second, I draw the conclusion that more transparency is needed. If I go back to the CUP Website, I find that the U.S. pricing for this title is $89.95 hardcover, $29.95 paperback. All evidence indicates that those prices are the same whether you receive a well-made artifact from the oldest university press in the world or a junky substitute manufactured by a vendor. I harrumphed about that to a non-Cambridge publisher I know, suggesting I should get a discount for the tatty version, and she was kind enough to explain to me patiently that I am getting that discount, because if the publisher can’t count on switching to POD at a certain point in the print run, the paperback copy would probably have to cost $39.95. That might very well be true, but as our presidential candidates repeatedly teach us, just because something is true doesn’t mean I have to believe it.

Now, I do have a six year old Cambridge Press Print-on-Demand title on my private shelves that is a perfectly serviceable book, good paper, vividly clear printing, soundly bound. Quality is possible. The problem is not new technology but cheap people — publishers, vendors, and readers who all think that second and third quality objects are quite good enough for “mere” reading. The word of the German senators, when their turn came in debate and they wanted to express dissent, sometimes confined themselves to a two word speech: ceterum censeo. “I think otherwise.” I do.
This is the life! I sit in my office and I think of a book I’d like to read. Often in a few minutes and never more than a few days later, I’m reading that very book. For one who started out his library life in a quonset hut on an army base in the desert, this is amazing and beautiful.

If life were merely amazing and beautiful, of course, we’d have no great works of art: no Picasso’s Guernica, no Moby-Dick, and no rivetingly memorable columns in *Against the Grain*. Fortunately, my experience has gone beyond amazing and reached the level of “you’ve got to be kidding.”

It started this way. There came upon me a fierce desire to read a new translation of *Thucydides*. Hobbes and Jowett and Crawley and Lattimore and Blanco are all so other-century, and beautiful.

I was disappointed. The book that arrived was a hardcover copy that had clearly been trouble reading the book. When I buy one of those, I always go looking for the bicycle tire valve on it, hoping that I can let all the air out and shrink it down to the size of a classic Modern Library edition, which is the right size for human hand and eye. Doesn’t work very often.

POD packaging is a success in taking ugly to the next level. Ugliness didn’t surprise me about my new *Thucydides*, but what did surprise me was trouble reading the book. One of the things *Thucydides* is famous for in his books is all the reported orations by distinguished statesmen, who explain exactly how they mean to take opportunity for glory and turn it into the shabbiest, bloodiest war of all antiquity. What does it mean, then, when I find that this copy of the book calls them speeches? Cost containment I can understand, but just how much do we save eliminating the cross-bars on the letter “e”? The vanishingly faint print of this badly made copy rendered the artifact nearly unreadable.

I harrumphed. Yes, librarians are too genteel to harrumph, but I was trained differently. Harrumphing is one of the core competencies inculcated in Provost School, and there I did very well indeed. Word of my harrumphing went out through the library staff, who heard me say that we should send this book back and get a better copy. A small number of days later another copy arrived, this time a paperback. It too was big — 1.75" thick, to be precise. I sat it next to my old *Signet* paperback of *Moby-Dick* and realized that if I’d had this *Thucydides* when I read *Melville* at 16, it wouldn’t have surprised me what they mean to take opportunity for glory and turn it into the shabbiest, bloodiest war of all antiquity. What does it mean, then, when I find that this copy of the book calls them speeches? Cost containment I can understand, but just how much do we save eliminating the cross-bars on the letter “e”? The vanishingly faint print of this badly made copy rendered the artifact nearly unreadable.

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And so I began to read. This copy was better than the last, containing actual speeches and no specchcs, though to my bifocular eyes it was rather faintly printed and in type rather smaller than necessary for something as, well, bloated as this. The “perfect” binding cracked the first time I opened it, not a good sign for a book meant to be a college textbook for diligent readers. I grew grumpier, uttered a few imprecations, and talked to a few people, whom I will preserve with anonymity from being immortalized in a rivetingly memorable *ATG* column, and I discovered a remarkable thing.

Sitting quietly in my office on February 19th, looking closely at the inside back cover of this second copy, I discovered a small logo there confirming that this book had been printed in San Bernardino CA on the 16th of February, 72 hours earlier. How could that be? I asked my colleagues; they confirmed that they had known that The Harrumphers wanted a fresh copy, and so they got it as fast as they could — from Amazon. Yes, and?

Well, it turns out that when a major publisher hands over a book to Amazon to sell, they may require the publisher also to provide Amazon with a PDF of the book. Amazon thereby acquires the right to produce what I will now call “Print-on-Demand” copies. For whenever Amazon decides that their commitment to deliver the goods as quickly and cheaply as possible requires, they have the right to produce a print-on-demand copy of the book and send it whizzing on its way. Never mind that the publisher, formerly an important link in this chain, has an abundant supply of copies in their U.S. warehouse, for those can all stay on the shelves, while Amazon runs off another one and sends it skittering down the supply chain.

When I learned this, gentle reader, I’m sorry to say that I harrumphed again. While I was harrumphing, Alfredo Garcia told me that the Harrumphers’ edict is well known in the state’s college textbook for the current term, and with it a copy of this book that was actually produced by its publisher! More scurrying ensued, and soon I had what I asked for.

This time I smiled. The actual book published by Cambridge University Press had the same trim size but was only 1.25" thick. The Amazon bloat-on-demand edition was fully 40% bulkier at 1.75”. The CUP cover was better printed, the binding was better (actual signatures), the paper color was easier on the eye (slightly off-white), and there was less bleed-through of text from the verso of a given page on the slimmer, lighter weight volume than on the Amazon copy.

So where had the original “hardcover” POD copy full of specchcs come from? That, I was now truly interested to learn, had come via Coutts, our old reliable distributor, and had come into being at Lightning Source’s Tennessee home, because the original print run of hardcover copies had run out. (This book is in a textbook-ish series published simultaneously in hard and soft covers, with a very short run of the hard covers. Unless you have the book coming on an approval plan or pre-publication...
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