Inside Outsourcing Technical Services: Upsides and Downsides

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

When we were approached with guest editing an issue of Against the Grain on outsourcing technical services, we jumped at the opportunity. Our regular column in ATG, Let’s Get Technical, focuses on practical solutions to common problems in technical services. Outsourcing is a popular and longstanding solution for technical services departments aiming to improve efficiencies or reallocate staff time into different or more expert areas. Outsourcing can also help libraries who are facing budget or staffing constraints or lacking in-house expertise. At American University, we outsource several processes to vendors, so we wanted to provide a variety of perspectives on the issue. The articles in this issue come from different types of libraries, give a vendor perspective, talk about leveraging technology and expertise in different ways, and describe the experience of libraries who have once outsourced but ended up bringing portions of it back in-house.

As can be seen from the stories in this issue, outsourcing can take a variety of shapes. We look at outsourcing from a vendor’s perspective in “Outsourcing: A Librarian Vendor Perspective,” by Charles F. Hillen, Director of Library Technical Services for G OBI Library Solutions at EBSCO. He profiles the many factors that need to be considered in outsourcing to a vendor. From selecting and ordering to cataloging and physical processing, starting small and keeping open communication ensure success between libraries and outsourcing vendors.

In “Gig Cataloger: Working as an Independent Contractor on an Outsourced Reclassification Project,” Catherine Eilers, now at Highland Park Public Library, documents.

If Rumors Were Horses

Hay-on-Wye advertises itself as “the United Kingdom’s mecca for bibliophiles.” The town “is less than one square mile in size, but it’s packed with independent booksellers curating all kinds of used and antique reading…” https://against-the-grain.com/2020/01/the-tiny-welsh-town-thats-brimming-with-books/

The indefatigable Tom Leonhardt took a trip to Hay-on-Wye and wrote about it for ATG! We haven’t seen much from Tom recently so I decided to ask him what was up. Great news! Tom says we may be seeing a column or two from him in the near future! Guess what! I just got a charming Oregon Trails about books and booksellers! Watch for it in our next issue.

Hooohaa! Jack Montgomery has won the WKU 2019 “Margie Helm Faculty Award for Outstanding...”

continued on page 8
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REVIEWS

Reader’s Roundup — Monographic Musings & Reference Reviews ..........43
by Corey Seeman — Two types of reviews in one column – monograph and reference reviews.
Corey says we are hitting our stride and has provided nine new reviews for this issue.

Booklover — Better Late Than Never Summer Reading.........................................................48
by Donna Jacobs — A work of fiction, Jenny, a novel by Sigrid Undset is on Donna’s radar!

Collecting to the Core — Classics of Sociology.................................................................49
by Cindy L. Craig — The ISA asked its members to list five books published in the 20th century that were most influential to their work as sociologists. This essay will examine a selection of these titles.

LEGAL ISSUES

Edited by Bruce Strauch and Jack Montgomery

Legally Speaking ........................................51
European Commission’s Copyright Reform
Raising Issues by Anthony Paganelli — The impact of this copyright reform should be studied for use in the U.S.

Questions and Answers .....................53
Copyright Column by Laura N. Gasaway
— As always, Lolly features many relevant questions and answers – included are several about the use of charts and tables by authors.

PUBLISHING

And They Were There —.............54
Reports of Meetings — In this issue you’ll find a report of the 2019 ALPSP Conference provided by Anthony Watkinson.

The Scholarly Publishing Scene ......56
The Innovators by Myer Kutz — All of Darrell Gunter’s innovation sessions at PSP annual conferences were not only informative, but also entertaining.

BOOKSELLING

Collection Management Matters .......57
BFF: Collaborative Partnerships of Collection Management and Systems Librarians by Xuemei Ge — Collection Management Librarians and Systems Librarians work together to provide much of the technological functionality required for innovation and enhancement.

Biz of Digital ......................................58
Transcending to a New IR Platform by Pam Pierce — In August 2017, Elsevier purchased Digital Commons-bepress, motivating numerous institutions to explore and commit to options for leaving the popular IR platform.

Both Sides Now: Vendors and Librarians.................................................................60
It’s the Relationship by Michael Gruenberg — Mike is concerned to see that many information industry companies today seem to turn over their sales staffs with great frequency.

AND VENDING

Marketing Touchpoints ..............61
Segmenting User Groups for Greater Inclusivity by Jill Stover Heinze — Segmentation is a widely-used marketing approach that involves analyzing and breaking up the group of all potential users an organization might serve into smaller groups based on how likely those users are to respond to particular offerings.

Optimizing Library Services ..........63
“…To Talk of Many Things!” by Ms. Britany Haynes and featuring Ms. Elysse M. Gould — Ms. Elysse M. Gould was the winner of IGI Global’s annual Librarian Sponsorship Program, which provided a travel stipend for the 2019 Charleston Conference.

Little Red Herrings ..................85
A Modest Proposal by Mark Y. Herring — Mark suggests that IR collaboration might be the solution to the growth of the big deal.

TECHNOLOGY AND STANDARDS

Wandering the Web ..........................22
STEM and STEAM: Selected Ideas for Children’s & Young Adult Programming by Roxanne Spencer — If your batteries are running a bit low on makerspace ideas, get your engines revved up again by following some of the examples, lesson plans, and templates here.

Considering Games in Libraries and Such .........................................................65
The Ultimate Library Instruction by Jared Alexander Seay — Student skeptics encounter a real game with a real analog article. And they want to do it again!

Epistemology ..............................66
Building Relationships by T. Scott Plutchak — Despite the ease and efficiency of online meetings, it turns out there is something irreplaceable about getting people together in person.

Emerging Tech: To Be or Not to Be? — Content Technologies ..........................67
by Deni Auclair and John Corkery — NEW column! This is the first in a series of articles about emerging trends in content technologies, with special focus on the scholarly publishing community and the companies that serve it.
Can you believe it? We thought we were getting an early spring. The temperatures were in the high 70s, almost 80! I hoped that winter had left us early. The weather has been so weird these days. Thought maybe I could try out my green thumb. Maybe.

Back at ATG headquarters, this issue — Inside Outsourcing Technical Services: Upsides and Downsides is expertly guest edited by the able team of Stacey Marien and Alayne Mundt. There are many aspects to consider. Charles Hillen takes the vendor perspective, Catherine Ellers gives the independent contractor perspective, Emily Flynn focuses on OhioLINK and quality control of vendor records, Benjamin Bradley and Beth Guay are interested in problems and opportunities, Joshua Hutchinson wants to understand outsourcing cataloging when there is no in-house expertise, Denise Soufi, Nanako Thomas and Natalie Sommerville talk about a cooperative pilot project between Duke and UNC-CH, Demetria Patrick and Melanie McGurr focus on health sciences library issues, Kay G. Johnson and Elizabeth McCormick weigh the cost of the service versus the personnel cost, Moon Kim and Moriah Guy focus on individual library technical service trends, Cecilia Williams, Nikita Mohammed and Amber Seelye document the process of bringing most of the outsourcing cataloging and processing back in-house. Whew! I told you there were a lot of aspects to outsourcing technical services.

Our OpEd by David Parker talks about publisher vendor relationships and how they are more complicated than we might desire. Jim O’Donnell focuses on the effects of cost cutting on higher education.

There are a ton of Profiles in this issue but no interviews. Watch for more next time! We have a lot of movement in the book reviews section — Corey Seeman’s Roundup, Donna Jacobs focuses on health sciences library issues, Myer Kutz stresses the importance of cutting on higher education.

There is the Roundup, VOLUME 32 — 2020-2021, but as my disability has progressed traveling and conference logistics have become a greater and greater obstacle for me. Virtual options like these make a huge difference to me. Thank you, Shawn P. Vaillancourt (University of Houston) <svaillancourt@uh.edu> 🌿

Letters to the Editor

Send letters to <kstrauch@comcast.net>, phone 843-509-2848, or snail mail: Against the Grain, Post Office Box 799, Sullivan’s Island, SC 29482. You can also send a letter to the editor from the ATG Homepage at http://www.against-the-grain.com.

Dear Editor:

RE: Charleston Library Conference 2019 Plenary Session Videos

Can I just say how much I appreciate the recordings?

I used to attend the Charleston Conference, but as my disability has progressed traveling and conference logistics have become a greater and greater obstacle for me.

Virtual options like these make a huge difference to me. Thank you, Shawn P. Vaillancourt (University of Houston) <svaillancourt@uh.edu> 🌿

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VOLUME 32 — 2020-2021

<table>
<thead>
<tr>
<th>2020 Events</th>
<th>Issue</th>
<th>Ad Reservation</th>
<th>Camera-Ready</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Report, PLA</td>
<td>February 2020</td>
<td>01/02/20</td>
<td>01/16/20</td>
</tr>
<tr>
<td>MLA, SLA, Book Expo</td>
<td>April 2020</td>
<td>02/20/20</td>
<td>03/12/20</td>
</tr>
<tr>
<td>ALA Annual</td>
<td>June 2020</td>
<td>04/02/20</td>
<td>04/23/20</td>
</tr>
<tr>
<td>Reference Publishing</td>
<td>September 2020</td>
<td>06/11/20</td>
<td>07/09/20</td>
</tr>
<tr>
<td>Charleston Conference</td>
<td>November 2020</td>
<td>08/13/20</td>
<td>09/03/20</td>
</tr>
</tbody>
</table>

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Rumors from page 1

Performance” which is named for one of the library’s former Deans. And what a great picture of him! Congratulations, Jack!!!

The dapper John E. Ulmschneider, dean of libraries and university librarian at Virginia Commonwealth University, has been named the 2020 ACRL Academic/Research Librarian of the Year! The award, sponsored by GOBI Library Solutions from EBSCO, recognizes an outstanding member of the library profession who has made a significant national or international contribution to academic/research librarianship and library development. Ulmschneider will receive a $5,000 award on Saturday, June 27, during the ACRL President’s Program at the 2020 ALA Annual Conference in Chicago.

The American Library Association announces the appointment of Tracie D. Hall as its executive director, effective February 24, 2020. Following a nationwide search, Hall was selected to succeed Mary W. Ghikas, who has worked for ALA since 1995 and served as executive director since January 2018. Hall is the first female African American executive director in ALA’s history. In addition to her MLIS from the Information School at the
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Inside Outsourcing Technical ... from page 1

ments the time she spent as a contract cataloger working on a reclassification project for an archaeological research institute in Europe. She pulls the curtain back on how outsourcing cataloging projects works for the individual contractor.

We also profile instances of new ways of working with vendors and vendor platforms to improve library services. In “OhioLINK and Vendor Records Quality Control,” Emily Flynn, the Metadata & ETD Coordinator at OhioLink, details how they have reported errors to vendors and worked with them to improve record quality. She advocates for persistence in communicating problems to vendors and for the library community to band together to communicate problems in vendor-provided records sets, as vendors may not be hearing about problems in order to make needed improvements.

Outsourcing does not always reduce the amount of work performed in-house. It can result in trading one type of work for another that requires different skillsets. At the University of Maryland Libraries, Benjamin Bradley, Discovery Librarian and Beth Guay, Continuing Resources Librarian, interpret outsourcing as the library transitioned to WorldCat Discovery. They outline the multitude of issues librarians face when the library catalog itself is outsourced, requiring the need to work with third parties for troubleshooting, and some of the tradeoff in terms of metadata display, the user experience, and being at the mercy of the vendor’s timeframe for enhancements and updates. On the flipside, it also presents opportunities for greater efficiencies in managing large packages and providing more seamless access to ETDs and requires different expertise and skillsets to manage.

Foreign-language cataloging projects are a prime area for traditional cataloging outsourcing. As we can see in “Outsourced Cataloging of Materials in Languages for Which There Is No In-House Capability,” Joshua Hutchinson, the Cataloging and Metadata Librarian at University of California, Irvine details how UCI has developed agile methods to catalog growing Korean, Armenian, and German language collections when there is no in-house expertise. A pilot project that we would be interested in trying at American University is exchanging language cataloging expertise between two libraries as described in “Homegrown Outsourcing: A Cooperative Cataloging Pilot Between Duke University and the University of North Carolina at Chapel Hill.” These two libraries, both in the Triangle Research Libraries Network (TRLN) consortium developed a pilot to exchange foreign-language cataloging expertise. Denise Souri from University of North Carolina at Chapel Hill and Nanako Thomas and Natalie Sommerville, both from Duke University outline how they collaborated to exchange Japanese and Arabic books for cataloging, a cost analysis of such a project, and the ultimate benefit of the exchange over outsourcing to an external vendor.

Special libraries are not exempt from the possibility of outsourcing, either. In “Outsourcing Technical Services in a Health Sciences Library,” Demetria Patrick, the Technology Librarian at Northeast Ohio Medical University and Melanie McGurr, Head, Electronic Services at University of Akron describe the challenges of outsourcing technical services when there is no technical services staff and working with OhioNET and OCLC to do the work. They also document strategies to help library administration understand the importance of technical services in ensuring a library’s success, lessons that can certainly be applied outside of special libraries.

Sometimes technical service units discover that there are reasons to bring all or partial outsourcing back in-house. These reasons can range from cost saving measures to wanting more control over resource description. In “Jumping Into and Then Climbing Partially Back out of the Pond,” Kay Johnson and Elizabeth McCormick from Radford University describe their experience over the past ten years of initially outsourcing their bibliographic records and processing for print books and then deciding, because of budget cuts, to bring the processing of books back into the department. They recommend that whenever a library is considering outsourcing, it’s important to weigh the cost of the service versus the personnel cost of keeping the work within the library.

In “Streamlining Workflows: Combining In-House Cataloging and Outsourcing to Achieve Institutional Success,” Cecilia Williams, Nikita Mohammed, and Amber Seely from Harris County Public Library document the process of bringing most of the outsourcing cataloging and processing back in-house. This has enabled their library to speed up time to shelf and provide a more customized collection for library patrons. Bringing outsourcing back in-house has also led to an increase in staff morale, greater in-house technical expertise. Converse to the perception of outsourcing, insourcing has improved efficiency within their organization.

Finally, Moriah Guy from GOBI, and Moon Kim, Acquisitions Librarian at Ohio State University, formerly at California State University, Fullerton, outline a collaboration between a vendor and library in “A Peek Inside Vendor/Library Partnership to Establish a Firm Order Workflow Through a Consortial Migration.” They developed a process during their migration to Alma that enabled them to avoid incurring duplicate record fees in a consortial environment where bibliographic records are shared with other libraries in the CSU system.
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Introduction

The decision to outsource technical services is a serious one that takes careful consideration and planning. Adding technical services work to the fulfillment workflow of library materials is, in many ways, the same as expanding your own operation. In a sense, you will be directing the work of a larger group of people than the one you have. Expressing your wishes and defining your local routines, conventions, and practices is time consuming and, although it is difficult, anything that your local staff do in every case, the effort can return benefits many times over. Outsourcing, when carefully planned and dutifully managed is a powerful boon to a library’s workflows and time constraints because receiving catalog records and pre-processed materials will allow the library staff to devote time and energy to other tasks, backlogs, or administrative priorities. My experience has taught me that outsourcing technical services flourishes best under overarching goals that favor this model. The rest of what I will share here represents the experiences I have had as an Acquisitions Librarian and as a vendor librarian who manages a technical services operation.

Preparing To Outsource

Preparing to engage a vendor for technical services may at first seem to be best guided by common sense. After all, we know the work that we are doing, so outsourcing should be as easy as telling someone else what we do, right? While that statement may be true from the 40,000-foot view, the devil, as they say, is in the details. Even if our local operation is small, the staff who are working with ordering, receiving, claiming, physical processing, and cataloging are making a lot of decisions every day that often do not make their way into procedural documentation. After all, if we were to record every single decision we make in the course of our work, our documentation would be vast, and our staff would be hard pressed to make good use of it. It is these day-to-day decisions — and how well our expectations are met as they are managed — that can wind up serving as the central hallmark of whether we judge outsourced technical services to be successful or not. It is very important not only to analyze the current procedural documentation that you do have, but also to ask the staff about the decisions they have made in the course of their work over time. Particularly where physical processing is concerned, deciding what to ask of the outsourcing vendor can become highly complicated due to concerns about stock, placement of items such as stamps and barcodes, and consistency, so it is vital to determine how important the steps your staff are following are to your collection management needs. If you feel strongly about a treatment or procedure, then ask the vendor for it. However, if you can live with some degree of flexibility, it may be easier to integrate the vendor’s services overall by waiting to see what the vendor will provide if such decisions must be made, provide feedback if the decisions need to be informed with additional detail, and build trust over time. Library services vendors see a wide variety of practices and treatments in use at libraries around the world, and they are never short of considerations as they make an on-the-spot decision for the one title that raises an eyebrow. However, the process of honing in on the particulars for your setting will take ongoing effort to settle and taking the time to prepare well can save time, money, and improve the overall experience.

Start At The Beginning, And Start Small

If you’ve been using a vendor for your book purchases, then you have likely ironed out how best to use their platform to make title selections. You may have also integrated the use of their platform into your collection development or selection program. Many if not most vendors will have a good understanding of the technical relationship between selecting and ordering and most vendors are aware of the many steps involved between placing the order in their platform and recording the order in the library system. So, it is best to start integrating technical services with a vendor at the point of order. Starting with an ordering service — usually one that will cut down on the necessary steps that get the catalog record and order record information (e.g., price, quantity, fund, location, selector, etc.) into the system — allows the library to establish a relatively low-cost relationship with outsourcing that will save time and labor hours (i.e., money) and is often less complex than outsourcing cataloging or physical processing.

While most vendors today are able to accommodate multiple ways to order, whether through the library system or on the vendor’s platform, it is a good idea to ask which ordering method will make the order fulfillment process itself the most streamlined because not all ordering methods (e.g., email) may be automated on the vendor side. Many libraries have specific ordering concerns that center on formats (e.g., eBooks or print), funding (e.g., donated/endorsement funds, regular budget funds, etc.), and particular content (e.g., juvenile literature or adult fiction), and one advantage of initiating use of a vendor with an ordering service is that you can start with just one of those concerns and easily build over time. Another distinct advantage of starting with an ordering service is that it will allow you to experience how your chosen vendor handles a variety of problem-solving scenarios, such as cancellations, mistakes in order or selection details, claims, speed of fulfillment, and system glitches because these issues are more simple to resolve than, say, discussing a cataloger’s judgment in descriptive cataloging. The dynamics of ordering allow the library and vendor to establish a dialogue that allows both parties to gauge service expectations and responsiveness and can give valuable insights into how to build a strong collaborative relationship.

Physical Processing

Remember those on-the-spot decisions the staff are making that I mentioned earlier? With physical processing, perhaps, the highest number of idiomatic and syllogistic decisions enter the outsourcing relationship. With no controls whatsoever imposed on publishers as to how their books will be shaped, sized, or printed, physical processing staff must be ready for anything. The problem is that it is impossible for the library to account for every way they may want processing to be handled in every given circumstance. Although there are many conventions that guide libraries in the arena of physical processing, such as those that result in many libraries using the same type of security systems, date due slips, and cover treatments, there are many options to choose from.

If the library has a developed preservation program, there may be more documentation available to guide decision making as materials are processed, particularly regarding labeling and stamping. In some settings, the Access Services or Circulation departments may have strong feelings about where call number labels and ownership stamps are placed, particularly if there is unique text on the end papers or there are images or maps that mean alternative treatments are warranted. Also, consistency with the practices that would be followed by the in-house physical processing staff is often a concern, so it is also important to discuss their observations of how the vendor is performing as materials are received.

Where the in-house practices may not be documented in detail, the waters of integrating outsourced physical processing must be navigated with great care. For example, if your library uses Dewey Decimal Classification, do you truncate when printing numbers for spine labels? Where do you break lines? In what circumstances do you require a prefix or suffix for location or other information with the call number? Do you print in bold type or a regular weight font? Which font do you use? — and the list goes on. These appear to be simple questions and most of them are, but
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if your library has proliferated local practices around shelving that involve the call number — and many libraries have — those practices will need to be accounted for appropriately depending on the scope of services that are wanted. And, of course, in order to generate a call number, there needs to be a catalog record from which to get it.

**Catalog Records**

Catalogers seem to know a good record when they see one — or at least a potentially good one. By that I mean that it is relatively easy to spot those records that look just a little bit too brief, or that probably ought to have more subject headings, or that may need added entries. With time and experience, catalogers develop an informed sense around record quality and completeness. And explaining what we expect to receive from a vendor is greatly supported by the standards we work with, such as RDA, MARC21, the LC Authorities, and others. However, with cataloging there is also a great deal of judgment involved as the cataloger needs to account for anything happening around local conventions or rule interpretations that have been routinely adopted in the local setting should be closely reviewed before outsourcing cataloging. Explaining these practices may be somewhat involved and a phone call or meeting may be the best way to discuss how feasible it may be for the vendor to integrate them. Often, vendors are able to adopt a certain amount of local practice into their cataloging workflows for customers, but the production concerns of the vendor’s environment can be quite different from those of a library, depending on the amount of cataloging they provide, the number of services they offer, and when cataloging has to occur in the order fulfillment process. Depending upon the amount of evaluation that is required to make the necessary decisions, the vendor may find it daunting to integrate certain practices, such as shelflisting, localized cataloging, or complete call numbers for all ebooks. It is very important to ask, regardless. I have been pleasantly surprised on more than one occasion to find that a vendor was able to manage more than I had expected.

With respect to completeness of cataloging, the idea of a “full record” can be informed by a variety of nuances that impact our expectations. It is important to know what the local cataloging staff are thinking about as they flesh out copy or create original records. Cataloging managers can usually provide relatively clear guidelines about the extent to which they expect their staff to develop catalog records, since they will be concerned about the delicate balance between quality and production in a similar way that the vendor is. While it is a good idea to ask to see sample records, they may only be so helpful without having the item in hand. It is possible, though, to look for descriptive anomalies and deviations from standards to an extent. Whether or not the vendor follows Library of Congress practices and/or RDA, for example, can be a good initial way to determine what other questions may need to be asked.

At the point of order, or later, when orders will be received, it may be possible to load a brief, placeholder record from the vendor. These records can play an important role in budget, discovery, deduplication, and inventory management, but only if the post-processing will be required in order to ensure full cataloging. The local workflows that manage these records, whether they be at the points of order or receiving, sometimes must be rethought to ensure that all these brief records are accounted for and receive the appropriate attention. When integrating outsourcing that mixes utilizing brief records from vendors with full records, complete shelf-ready services, or no records at all, it can be easy to miss the odd brief record. In all my work settings, the cataloging units always conducted routine audits to locate brief records that somehow missed being upgraded.

**Building Trust For Long Term Success**

Establishing solid quality control processes, at both the library and in the vendor’s operation, is perhaps the best way to integrate services and enhance evaluation, but only if the server services are performing. In terms of physical processing, the first line of quality control at the library is usually managed by the staff who receive the materials. Where catalog records are concerned, there may be multiple opportunities to review records as they are received, particularly for experienced staff who may be able to spot concerns on sight. On the vendor side, quality control is paramount as service charges are commensurate with the value offered, and services that are marred by high margins of error are not typically considered valuable. Even though the library may start small and add services and options slowly, eventually quality control will become more involved as the relationship deepens. It is very important for both parties to be vigilant of opportunities to perform quality control and to discover any potential issues as quickly as possible. This commitment to the relationship will ensure its vitality in the long term.

As the library becomes more familiar with the vendor’s capabilities, their reliability, and management of the unexpected, the relationship normalizes. This normalization allows better understanding of expectations on both sides and creates a working partnership that develops and matures into a true collaboration that can weather the ups and downs of materials budgets, standard and technology developments, and workflow changes. When the rapport reaches this stage of maturity, the library may feel more confident in asking about details, services, and activities they may want to add. Also, as services and collecting emphases change over time, options and choices that once fit the bill will need to be changed.

Through ongoing conversation about plans and needs, and close communication about day-to-day observations, the viability of the collaboration will become clearer and the bond between the library and the vendor will be tempered. The vendor needs to offer relevant and meaningful solutions and perform reliably while the library responds to environmental changes. Of course, the vendor will be designing services and options that promise to have broad appeal, while the library will need to manage the needs and expectations of its local collection development programs. This dynamic will test the boundaries of the services the vendor can confidently provide, drive how they develop new and better services, and it will also help the library to hone the awareness of its most critical needs.

**Conclusion**

With careful planning and commitment from everyone involved, the library-vendor partnership will thrive and achieve meaningful results. I have always found that using a measured approach with careful planning works best to allow new business partners to test and measure success, and to build trust over time. The working relationship inevitably gets stronger as reliability is proven, and as unexpected issues are resolved. Engaging fully — which invariably means keeping the lines of communication open and active — will be work for both the library and the vendor in order to achieve the biggest benefit, but the effort is worth it. 🎉
The records to be addressed were provided on spreadsheets. The library’s records were of varying quality and lacked OCLC numbers; had they had OCLC numbers, much of the work probably could have been automated. The holdings were spread across several locations, some of which were excluded from the project. The task for us contractors was, for the relevant holdings, to find a matching record with an LC call number in WorldCat, if possible, and if not, to assign a new call number and record it in the bibliographic and item records.

We did not need a list. Pay was per completed call number, paid monthly. Any call numbers applied to erroneous locations (those excluded) were unpaid, and we were not allowed to make any other changes to the records, although our permissions did not actually prevent us from making edits to other fields. Any security protocols that were in place for the library’s benefit were invisible to me and not explained, and I did not attempt to test the limits of my permission levels.

As contractors, how we completed the work was up to us. Each person working on the project probably developed their own approach to complete the work efficiently, but I never had any contact with any of the other contractors. I looked first for a Library of Congress call number in the library’s bibliographic record, which a few records did have. When that was the case, I simply created a Cutter number and copied the whole number to the relevant item records. Lacking an LC call number, I next looked for a Library of Congress Control Number (LCCN) and, if it existed, used it to search in Connexion. The next option was to search by title or, if necessary, by transliterated title. The majority of records were in English, but a significant minority were in Greek; the Greek records paid a higher rate because of the additional time needed for transliteration. I don’t read more than a few words of Greek, but having become familiar with the Greek transliteration tables while previously cataloging at a theological library, I aided at the time by auditing two semesters of Biblical Greek, helped me to work quickly enough with these records to earn a reasonable hourly rate.

If I found that a record existed in WorldCat with an LC call number, it could be copied. If not, I examined the subject headings to assign a call number using ClassWeb. Google Translate was useful for trying to determine the subject of non-English records, and I used Wikipedia to help me quickly locate categories for people and places. Although the more challenging records — those that weren’t for English materials or that required a little research — would have been the more interesting in other circumstances, being paid by the record made the simpler records preferable. While working, I was always cognizant of what, approximately, I was earning per hour. At the same time, I did enjoy working with a new-to-me library’s collection that familiarized me with areas of the classification schedules that I had not used before.

When the library’s system would be down for scheduled maintenance, we were clearly advised in advance, but, as is normal, there were occasional system problems that interrupted work. For someone like me, who was tightly scheduled and paid by work completed, these interruptions were a little annoying to work around, but they were fortunately rare in the course of the project. For the library, not paying workers for downtime outside their control was an advantage.

Most of the work was straightforward. When I did have questions, all contact with the cataloging vendor was by email. All the documentation and instructions I had been given had been written by the vendor (apparently based on information provided by the library) and requests for clarification sometimes had to go from the vendor back to the library. The vendor always responded quickly and gave us an alternate contact when he would not be available, but the library seemed slower to respond to his questions. The time zone difference contributed to this slowness. Although there could be a time lag of up to a day to receive an answer, the delay wasn’t too disruptive. I could simply skip over the relevant records and work on others until I received an answer. However, clear and easily-understood instructions were fundamental for making the project both financially viable for the outsourced labor and satisfactorily accomplished for the library. It’s not in the financial interest of the labor to spend more than minimal time reviewing instructions or asking questions — that time is unpaid time.

Results and Impact of the Project

A feature of working as outsourced labor is being removed from the results and impact of the work. The reclassification project was finished by the library’s desired deadline. From my perspective, we contractors knew when the batch of work available to be done was the last of it, and once that was finished, there was simply no more. My work on the project ended as quickly as it started. The impact to the library is unknown to me, though presumably it
was a good result. All the feedback during the project had been addressed generally to all the contractors, reminding us of various guidelines or updates to them. While this communication implied that the vendor, the library, or both were reviewing our work and perhaps adjusting for consistency, my role in the project was removed from that aspect. I did not receive individual feedback to know whether I was doing particularly well or needed improvement, from which I surmised that I was doing well enough. Of course, we were thanked by the vendor, both during the project and at the end. While the end to the project was anticlimactic, if the library had an antipathy in the results, I didn’t have to handle it. Being able to complete the work and be entirely free from involvement afterward allowed me to redirect my time quickly.

The Logistics of Being an Outsourced Librarian

Traditional library jobs don’t tend to involve working from home with regularity, and this was my first experience with it. Because each of the two other library jobs I had required a 45- to 60-minute commute each way (and were about the same distance apart), the lack of commute made fitting in this third source of income much more possible. My typical schedule was to work for three hours in the morning on each of the two days a week that I worked an afternoon or afternoon/evening shift in the library, and then four hours in the morning on one of my days off. Without disciplining myself to stick to a set schedule, I could have kept up with the commitment. However, I did take advantage of the flexibility to rearrange my contracted hours worked whenever I wanted to take a few days off.

My tax situation, already somewhat complicated by having more than one job, became more so when I started receiving some income as an independent contractor. Conveniently, I started the project at about the same time as I was meeting with a tax preparer to file for the previous year. The preparer explained that in the current year, I could file quarterly estimated taxes or, because I had other jobs at which I was classed as an employee, increase my withholding at one or both jobs. Based on my general estimate of how much I thought I could earn, he suggested an additional amount to withhold. I chose this latter route. I was apprehensive that I wasn’t withholding enough, but my occasional back-of-the-envelope math seemed to indicate that I was. Fortunately, when I filed my taxes for that year, I didn’t owe a penalty. In fact, the changes to the U.S. tax code for 2018 unexpectedly were in my favor, and I received a refund.

Beyond taxes, my finances in general became more complicated when I began working on the project. Some financial drawbacks common to gig work, such as paying for my own sick days and purchasing my own health insurance, were mitigated by having limited benefits provided by my two part-time library jobs and health insurance coverage through my spouse’s work. What was difficult was comparing the profitability of the three income sources with one another and with other possible jobs or gigs. Each had different pay and benefit structures, different availability of hours, and a different number of hours spent commuting. Gauging whether another opportunity was more or less lucrative was difficult, and I could only roughly estimate my overall annual income.

Further Analysis

At In the Library with the Lead Pipe, Emily Ford surveyed the literature on librarians working part-time jobs, as well as her own experience. While Ford included diversity of work experience and flexibility (particularly when an individual needed only one part-time job), while the drawbacks included lack of health insurance, commuting, poor integration into the workplace, scheduling (when an individual had multiple part-time jobs), and lack of paid professional development time. Compared to my part-time library jobs, the contractor position magnified some of the benefits and some of the drawbacks. My other two library jobs were both flexible and accommodating, but the scheduling problem did occur because changing my schedule at one job nearly always required asking for a schedule change at the other. In the contract position, by contrast, the flexibility was an enormous benefit because I set my own schedule. Although I tried to keep a regular schedule for my own benefit, it was not required, and I did not need even to notify anyone else when I was working. If I wanted to earn more, I could simply choose to work more hours. Having no commute was also a huge benefit. Because the contract position did offer the stipend to workers committing to full-time hours, it provided more for insurance than most non-traditional jobs.

However, in terms of integration into work culture and professional development time, the contract position offered nothing. I want to stress that I had no negative experience with the work culture, but there simply was none. For supplemental work, this lack was not problematic and at times even beneficial. No time had to be spent on anything other than the actual task. Similarly, it was beneficial not to have to invest time in professional development as part of a side job. Had contract work been my only work, though, these benefits would have been negatives. I don’t know how I would continue to be a successful librarian without interaction with colleagues and professional development. Similarly, I don’t know how I could have performed this contract position without the experience and professional development investment provided by previous positions.

Books and articles on the gig economy as the future of work proliferate, but the role of gig work in the job market is uncertain. For example, The Gig Economy (a how-to business guide first published in November 2016), and Temp (an economic history published August 2018) present a range of very positive to very negative views of gig work within just two years. Even the most positive author, Diane Mulcahy, writing in The Gig Economy about how to thrive as a gig worker, suggests that one way to succeed is to perform gig work as a full-time job.

My experience echoed this suggestion. When, about halfway through the contract classification project, I had the opportunity to take a regular full-time position, I did so. I applied for and was offered a full-time position at the public library where I had been working part-time, and I decided to take it even though the salary was a little less and the hours a little more than I had between two part-time jobs. I left my adjuncting job but continued with the contract position until the project concluded at the end of the year.

Without knowing it, I may have been part of a larger employment trend. According to a Bureau of Labor Statistics survey conducted in May 2017 and released in June 2018, the number of people in the United States who, in their primary position, are contingent workers (those expecting their jobs to be temporary) or alternative workers (those who are independent contractors, on-call workers, or who work for temporary or contract agencies) is actually smaller than it was in 2005. It’s possible that a greater number of gig-economy workers exist in the U.S., but, like myself, they are supplementing another job. Library employment also appears to have a shrinking number of employees hold multiple jobs without any one being full-time. Library Journal’s “Placements & Salaries 2018” survey found that “[o]nly 15% of employed 2017 graduates took part-time positions...down by half from 2015...The majority of this year’s part-timers hold only one position, with 40% reported holding two.”

Conclusion

As supplemental work, working as an outsourced contractor allowed me to earn extra money using skills I already had and equipment (a laptop and an Internet connection) that I had already invested in. I had no commute or any additional overhead, and I could set my own hours. I was glad to be of indirect service to a library’s patrons. The experience was positive, and although I wasn’t drawn to gig work as a career path, I would be open to taking on another such project in the future for supplemental income. From the perspective of a gig worker, what libraries can do to make an outsourced project attractive is to keep the work straightforward, provide clear and thorough instructions, and attempt to maximize flexibility and potential earnings for the worker. The workers that libraries employ and invest in may be the same workers to whom libraries are outsourcing.
OhioLINK and Vendor Records Quality Control

by Emily Flynn (Metadata & ETD Coordinator, OhioLINK)
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Overview
The Ohio Library and Information Network (OhioLINK) is the Ohio academic library consortium with 118 member libraries from public universities, independent colleges, two-year colleges, law schools, and medical schools, as well as the State Library of Ohio. Prior to 2014, volunteers from OhioLINK member institutions provided MARC records for consortially-purchased, shared electronic resources (e-resources) but since then, OhioLINK central office staff have taken on this role. With now having a dedicated cataloging staff of two full-time employees, OhioLINK has been able to do record clean-up projects as well as work to improve vendor record quality control, which includes streamlining batch record editing and engaging vendors with record issues and ideals. At the end of the day, both libraries and vendors want their materials to be found and used by end users.

Performing Quality Control on Vendors Records
MARC records from vendors often need editing of some sort, whether it’s because there is information missing or because it needs updating or correcting. Due to our OhioLINK e-resource records being provided to so many members, our cataloging staff takes time to address quality control on behalf of them, since any time spent in the central office saves the time of all our members. By making the edits in the OhioLINK office, our members do not have to take the time to each make them, or not be able to and then have lower quality records. However, while saving the time of our members is important, so is streamlining our efforts to do so in an efficient way. There are three main aspects to how we preform quality control on vendor records: guidance from committee cataloging standards, MarcEdit features, as well as reassessing workflows and conducting projects as needed.

continued on page 16
OhioLINK and Vendor Records ...
from page 15

OhioLINK has numerous member committees that, among other things, set policy. The Database Improvement and Discoverability Policy Team (DIAD) has several cataloging policy standards by format that set expectations for OhioLINK shared e-resource records. The DIAD cataloging standards build off national standards and add priorities and preferences such as OCLC number, call numbers, and specific wording for consortial notes and links. Based on guidance from these standards, the OhioLINK cataloging staff review and batch edit vendor records to ensure that they are up to DIAD’s standards before the records are provided to members for local use in their catalogs.

As a practical matter, MarcEdit is our main tool for batch editing. It is free software created and maintained by Terry Reece, who also has documentation on his website and some short instructional videos (https://marcedit.reeset.net/). MarcEdit has many useful features, both basic and advanced that facilitate easy batch editing. Basic features such as Field Count report, Add/Delete Field tool, and Replace tool help figure out what is in or missing from the records and quickly apply batch edits to the entire file. Advanced features require a bit of set-up but are worth it since they are quite powerful. There are quite a few but OhioLINK uses the customizable Assigned Tasks the most, especially for adding OhioLINK proxy links and notes, correcting indicators, and moving non-electronic ISBNs. Also, Validate MARC Records is great at finding certain errors in the metadata or any oddities that might cause issues when loading the records. As a batch editing tool, MarcEdit is both versatile and robust, saving a lot of time.

Beyond committee standards and MarcEdit, the final aspect of quality control at OhioLINK is making use of the dedicated OhioLINK cataloging staff at the central office. Now with two full-time cataloging staff, OhioLINK has been able to reassess workflows for various vendor records and complete quality control projects. Overtime, vendor record quality can change for the better or for the worse, sometimes drastically but usually gradually. Due to this, it is important to be flexible and reassess workflows as changes arise. OhioLINK strives to streamline quality control through automated or batch editing means when possible, which is why MarcEdit is a valuable tool. As far as projects go, this can include retrospective projects to clean up issues found in cataloging records and bring them up to current DIAD standards.

Working with Vendors to Improve Record Quality

Ideally, vendors would understand the value of and provide full-level cataloging records that are complete and include OCLC numbers, but that is not always the case. Although many vendors provide MARC records, they do not seem to be high on their priority list. The quality and standards of the records vary by vendor although some offer certain customizations, typically set during purchase. Over the years, OhioLINK has worked with different vendors to improve their record quality in two separate ways: reporting issues and engaging about larger trends.

Reporting cataloging and quality control issues with records to vendors is a simple way to call their attention to record quality that many are not even aware occur in their MARC records. Some vendors provide their own records while others contract with OCLC to provide them on their behalf. This means that sometimes issues might need to be reported to a vendor while others to OCLC. Since OhioLINK began regularly reporting issues, it seems that vendors were not aware of the quality control issues or why they were problematic, making it sound like vendors are not hearing about these issues from other libraries. This could also be a result of newer systems auto-loading records into the local integrated library system (ILS) and catalog without, or with minimal, review by library staff or catalogers which means the issues are less likely to be noticed and thus not reported. Also, perhaps there is a belief that reporting cataloging record quality issues to vendors will not make a difference. Even in a case in which a particular vendor was not going to be able to make the change that OhioLINK asked about, at the very least the importance of full-level, complete records was conveyed to the vendor even though the request was not currently achievable by the vendor at the time. One library reporting an issue, or their ideal record preferences, only holds so much sway, but a whole community has a louder voice and can make a larger impact together. As staff time and resources become more valuable, working together as an entire library community could be an important way in which to improve overall record quality of vendor records.

While reporting issues, OhioLINK cataloging staff start to document trends when found and due to this have been able to engage certain vendors on larger discussions about record quality and how to improve it. In one case, OhioLINK is working with OCLC and a publisher in a joint effort to identify the causes and remedy them to ensure higher quality vendor records for that collection. Discussions took a while to begin, since it was not clear where or with whom the issues were occurring. Time and persistence, along with reaching the appropriate vendor staff helped get the process started, but it was the detailed examples and documentation that ensured their attention and willingness to engage about their record quality. Part of what has helped is a good relationship with the publisher’s sales representative, who suggested the relevant people to work with when the issues were not getting resolved. It certainly takes time to document and work together as a group on record quality for this collection, but OhioLINK values the bigger impact that it will have in the long run. Not only will improved record quality benefit OhioLINK and our member institutions that use OhioLINK-provided MARC records, but also all of the other libraries worldwide who purchase this collection and use the vendor records. It is with this in mind that OhioLINK continues to pursue the improvement of record quality for all vendor records.

Conclusion

Working together, libraries and vendors can improve MARC record quality to the benefit of libraries, vendors, and the end users to facilitate better use of purchased content. This is particularly important for e-resources since quality metadata drives their discovery and use. While libraries can address vendor record quality locally, including by streamlining batch editing, documenting and reporting issues and larger trends to vendors, it takes additional staff time and resources which may not currently be possible at many libraries. Working together as a library community on vendor record quality would take the burden off of individual libraries while making use of their local expertise.

Over the years, OhioLINK cataloging staff have learned many valuable lessons from vendor records worth sharing. When starting with a new vendor, make sure to discuss record quality, get sample records, and ask about customizations since many offer them. It also helps to distinguish “required” information or fields versus “nice-to-have” so the vendor will know what the library values and why. All vendors have different processes for creating cataloging records. Some create their own, others contract out, some machine-generate, and some have in-house catalogers. This variation means that some vendors can more easily address issues than others, depending on their MARC record workflows. While it never hurts to inform vendors of record quality, be prepared for the possibility of minor to no improvements being made. Also, even if vendors can fix issues and address the larger trends, changes can take a while, which can be due to what is being requested or how much demand there is for it, which is why the library and cataloging community reporting issues and engaging vendors about record quality matters for everyone.
Outsourcing Cataloging at the University of Maryland, College Park: Problems and Opportunities

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Background

For the University of Maryland Libraries (the Libraries), a major outsourcing initiative began in late 2011 following an earlier implementation of WorldCat Local as a discovery tool. The Libraries transitioned from MARC record set loads of e-resources collections into the local catalog to the creation and activation of e-resources collections in the WorldCat knowledge base (WCKB) using WorldShare Collection Manager. WCKB collections automate holdings maintenance on WorldCat catalog records and provide direct linking from those catalog records to the Libraries’ e-resources in the local discovery layer.

Cataloging of individual ebooks purchased on approval plans or firm orders transitioned from review and enhancement of vendor MARC records loaded to the local catalog to title activations in appropriate knowledge base collections. Catalogers of monographic e-resources not sourced from vendor records but received on standing orders or subscriptions, licensed in perpetuity and not available in WCKB collections, discontinued exporting catalog records to the local catalog, and instead began creating and updating local WCKB collections for access provision. With the cessation of use of SFX by staff in the then Technical Services Division of the Libraries in December 2015 and the completion of the data migration to WorldCat Discovery (WCD) and the WorldCat link resolver in July 2015, electronic resources cataloging transitioned from a traditional to a highly automated and outsourced environment. From yet another perspective, with 77% of the Libraries FY2013 expenditures among print and electronic books and journals going to electronic resources, WorldCat Discovery had effectively replaced the local catalog.

In June 2013, seven Metadata Services Department staff members’ duties included e-resources cataloging, among other assignments. Following staff retirements, departures, reassignments, and a March 2017 reorganization, the number of catalogers working on electronic resources, among other assignments, had fallen from seven to three. Thus, cataloging of some monographic e-resources received on standing orders or subscriptions, licensed in perpetuity, and not available in WCKB collections was suspended.

The reorganization resulted in the formation of four new units within Collection Services (formerly the Technical Services Division): Acquisitions and Data Services, Continuing Resources and Database Management (CRDM), Discovery and Metadata Services, and Original and Special Collections Cataloging. This change brought relief in the form of a new Discovery Librarian position. The Continuing Resources Librarian, one of the three remaining e-resources catalogers, and the Discovery Librarian began collaborating to distill the benefits of the outsourcing experience.

Outsourcing Problems and Opportunities

Problem: Transportation research record

SFX had been customized to push local catalog record URLs to the link resolver services menu for catalog records lacking an ISBN or an ISBN in the first ISBN field of catalog records that matched those in the SFX knowledge base. This functionality was of course lost in the migration to the WorldCat link resolver. In these cases, from the local catalog, the WorldCat link resolver returns a canned response, “We were unable to find direct full text links for this item.” A good number of e-resources local catalog records produce this response, for example, many among the 124,885 “legacy” e-resources records that had been loaded in MARC record sets.

As intended when the Libraries first implemented WorldCat Local, URLs from local catalog records are accessible in WCD. OCLC created a Groovy Script for making this service possible. With this fact in mind, the Discovery and Continuing Resources librarians had discussed the issue of duplicate working links displaying on WorldCat catalog records from local catalog records and from the WCKB, concluding that the inconvenience to the patron would be negligible.

In situations in which domain and/or path names for URLs within e-resource records that had been loaded into the local catalog changed, local catalog URLs would present an inconvenience to WCD users. One such problem did surface, through staff investigation, on two separate occasions, for titles in the series, Transportation research record, or TRR. In the first instance in 2018, a STEM librarian was considering withdrawing print versions of resources for which the Libraries’ had purchased perpetual access to corresponding e-versions. The librarian consulted with CRDM’s Library Services Supervisor, who determined the extent of the Libraries’ perpetual access rights; the Library Services Supervisor then consulted with the Continuing Resources Librarian, because e-version records for titles in the series were in the local catalog. The staff then discovered the URL changes. An additional factor for consideration was that the cataloging of these e-version resources had been suspended due to the previously discussed staffing issues. The Continuing Resources Librarian and Library Services Supervisor consulted with the Discovery Librarian, who created a local WCKB collection derived from the OCLC numbers of the local catalog records for the resources, and globally updated the collection URLs. In addition, the Discovery Librarian identified local catalog records for URL field deletion by the Consortial Library Applications Support (CLAS) unit (staff responsible for the ILS database) to prevent the incorrect links from appearing in WCD.

To create the local collection, the Discovery Librarian worked with CLAS to receive the MARC records for the series and then used MarcEdit to transform the MARC records into a KBART file. The MARC 2 Kbart Converter MarcEdit plugin pulls the necessary data from MARC records (such as the URL, title, and standard number) and creates a tab-separated values file using that data. The Continuing Resources Librarian alerted the Discovery Librarian of the previous two cataloging policies for e-resources: the earlier “single record approach” under which e-resources holdings were added to print version records, followed by a “separate record approach” to print and e-version resources. WCKB records need an OCLC number to place holdings on the corresponding record and for linking. Because of the two different cataloging policies, the Discovery Librarian needed to find which OCLC numbers in the local MARC records referred to a print master record and which referred to an electronic master record. Using the OCLC numbers from the local records, the Discovery Librarian ran a Z39.50 batch search of the WorldCat database using MarcEdit. Once MarcEdit returned the set of master records, the Discovery Librarian exported the 776 (additional physical form entry) fields to check what other formats were listed. If the 776 subfield $i referenced a print version, the librarian could then deduce that the record was an electronic version and the OCLC number was correct, and if an electronic version was referenced, the Discovery Librarian could replace the OCLC number from the local record with that OCLC number. Finally, the URLs needed to be updated. This was a minor change, as only the domains needed to be changed, which could be accomplished using find and replace, correcting all the URLs at once. Then the 881 records in the KBART file could be uploaded as a local collection to WorldShare Collection Manager, adding the Libraries’ holdings to the correct records and linking directly to the resources.

The second incidence occurred about a year later, when the Acquisitions and Data Services Graduate Assistant reviewing the TRR license found that links to the resources via WorldCat Discovery were again failing. She reported the problem via the Libraries’ help desk ticketing system, and within minutes, the Library Services Supervisor contacted
Continuing Resources Librarian. 8  Once again, they consulted with the Discovery Librarian, who quickly resolved the URL access problem. In the previous incident, the base URLs needed a small update, but in this case, the series changed platforms so the changes to the URLs were more significant. However, the Discovery Librarian found that the URLs for each issue followed a similar pattern; the domain and path for each title’s URL contained the same domain and path followed by a pattern using the title’s issue number. Using find and replace in a text editor, the Discovery Librarian used regular expressions to automate the URL corrections. This time, the Continuing Resources Librarian suggested contributing the Libraries’ local WCKB collection to OCLC’s global collections, since the staffing issue remained, and the cataloging of this particular collection had been suspended. If contributed as a global collection, there would be potential for other catalogers, outside of the Libraries, to add to it. 9 This time, the Continuing Resources Librarian took steps to remove local catalog records for the e-resources, in consideration of several factors, including differing past e-resources cataloging practices, new practices, and that e-resources in this series were no longer being cataloged. One effect from this action was that call number searching for these e-resources, lacking local catalog records, is no longer an option in WCD.

**Problem: Discoverability of PMLA in WorldCat Discovery**

While WorldCat Discovery and the associated systems offer efficiencies, they can come at the cost of local control over the metadata presented to users and the user experience in general. One such example was brought to the Discovery Librarian’s attention by a Humanities Librarian. The librarian was having trouble finding the Libraries’ print holdings for a journal. The Discovery Librarian looked into the problem and found that when the user tried finding the title, PMLA, the Publications of the Modern Language Association, an important title for our English literature students, the appropriate records with the Libraries’ holdings attached did not display on the first page of results; they were often buried and ended up around the fifth or sixth page of results. 10 This search surfaces article and issue records from Crossref, all titled “PMLA.” The results do not provide enough metadata to the patrons to understand what the articles are about (see Figure 1). These records do link to the journal’s homepage and display our coverage. Nevertheless, the Libraries’ print holdings would require expert searching to find. This is an example of the problem-solving libraries with outsourced cataloging face: library personnel need to work with multiple third parties to trouble-shoot problems.

![Figure 1](image1.png)

When this issue first arose, the Discovery Librarian worked to find the source of the problem: was this a problem with the system provided by OCLC (WCD), or a problem with the metadata provided by Crossref? He began by exploring the records in WorldCat Discovery. They were created from the Crossref data, had a minimal amount of metadata, yet included DOIs. The DOIs in the article records redirected to a defunct DOI page on Crossref, but the DOIs in the issue records successfully directed to the correct issues of the journal. He then used Crossref’s Metadata Search tool to search for more about these records. The tool provides access to the Crossref metadata in a JSON format, wherein he found that many of the records had “Test accounts” listed as the publisher (see Figure 2). 11 Because the records appeared to be test records, the Discovery Librarian contacted Crossref to ask if there was anything that could be done about them. The contact at Crossref explained that these records were a holdover from an older method for managing defunct DOIs, and that there were no current plans to fix those DOIs. The Discovery Librarian posted on the WorldCat Discovery Community Center, a forum hosted by OCLC for librarians using WorldCat Discovery, asking if other librarians had encountered this problem. A few librarians responded about similar situations and shared an enhancement request. Since then, OCLC has shared that they hope to make changes to their algorithm that would help fix these problems. On the other hand, Crossref could clean-up the metadata for these defunct DOIs.

![Figure 2](image2.png)
Opportunity: Automated KBART Feeds

One opportunity libraries can leverage with the automation afforded by the connection of WCD and WorldShare Collection Manager is automated KBART feed services. This service enables publishers to send a library’s entitlements to OCLC to automatically activate its holdings in the knowledge base. While the process is automated, initiating the service is not a matter of merely flipping on a switch; it requires manual intervention.

In our case, the KBART feed activates titles in two collections, one for serials titles and one for monograph titles, which cannot have titles already activated in them when the automated feed service begins. The Discovery Librarian worked with the Head, CRDM, to deselect titles in these collections. To prevent loss of access, they worked together to activate these titles elsewhere: The Discovery Librarian created a collection for the eBooks, while the Head, CRDM worked with her staff to ensure that the serials were activated in other collections.

After they were sure that the eBooks and serials were activated in other collections, the Discovery Librarian deselected the eBook and journals collections, and the Head, CRDM retrieved the Libraries’ credentials from the provider, Springer Nature, and sent the command, via email, to OCLC to start the automated feeds. Subsequently, the ebook collection received 44,489 records from Springer Nature, 29 of which were listed as invalid, meaning 29 eBook entitlements were not activated. Upon review of the report for the load, it was found that these titles did not yet exist in the knowledge base collection. The Discovery Librarian reached out to Springer Nature, and over time, the missing titles were added.

Overall, automated feeds demonstrate the potential of the Collection Manager and the KBART format. Vendors sending KBART data for your entitlements to manage library e-resources holdings updates is the goal of the KBART automation recommended practice and is something that has been gradually adopted by vendors and system providers. While there is much promise in the automation, the process is not perfect, requiring manual interventions and checks to ensure quality.

Opportunity: ProQuest Dissertations and Theses (PQDT) Global KB project

By leveraging WorldCat data using WCD, libraries are able to provide enhanced discovery and access to materials not previously available in their traditional catalogs. However, the scope of WorldCat is larger than the WCKB. Materials the library has access to may be discoverable in WorldCat because of library-contributed records, but without a corresponding WCKB collection, a library cannot provide access to those materials. At the University of Maryland, this situation has resulted in ILL requests for such materials. In particular, the ILL department found that ProQuest Dissertations & Theses titles made up 16% of ILL requests received and cancelled because the title was available on the PQDT platform, the largest of any single platform in their study. So while the discovery layer enables the Libraries’ users to find records for resources to which they are entitled, it does not offer access to those resources because of the lack of a knowledge base collection. Furthermore, ILL staff are inconvenienced by having to review and redirect patrons to the PQDT platform. The Discovery Librarian undertook the work of creating a collection for PQDT titles to provide both discovery and access in WCD. PQDT is a large collection; as of this writing, ProQuest states that the database contains 5 million items, and from some searching in WorldCat, there are an estimated 1 million titles cataloged there.

In order to work on such a large collection, the Discovery Librarian developed a Python script to use the WorldCat Search API to find records for ETDs and to write the data to a file. The script is run from the command line and searches only a single year at a time because the API limits access to the first 100,000 search results, meaning one cannot pull all the records at the same time. Initially the script wrote the results to a file and required manual data cleanup and transformation of the MARC21XML into KBART using MarcEdit. The Discovery Librarian has since refined the script to automate the data cleanup and conversion from MARC21XML to KBART. While searching by

continued on page 20
The authors have illustrated that within libraries, interdependence across unit and division lines is indisputable in highly automated environments. In the case of Transportation research record, within Collection Services, staff in three of the four units played roles in identifying problems and contributing to their resolutions. In this effort, good communication skills have shown to be essential. We have also demonstrated that hand in hand with highly technical skills, institutional memory plays an important role in the process of electronic resources management in libraries.

Working across division lines, e.g., the Collection Services Discover Library’s work with the ILL department, has also been shown to be highly valuable. Beyond collegiality, creativity as shown by the Discovery Librarian’s approach to assisting the ILL department’s PQDT problem is a useful and effective complement to technological “knowhow.”

The methods and tools for creating the PQDT knowledge base collection have supported the creation of many others. In addition to subscription databases, the Discovery Librarian has developed and contributed a number of open access collections (which also includes collections whose titles are in the public domain) to the WorldCat knowledge base. These open access collections include the University of Nebraska-Lincoln Zen books, Indiana Authors and Their Books from Indiana University Libraries, the Illinois Open Publishing Network, University of Nebraska-Lincoln Open Access Journals, ACRL Open Access titles, and more. The Discovery Librarian is looking into additional avenues for sharing these KBART files, such as sharing them on GitHub in addition to sharing them via the Library.

While the automated KBART feed is an incomplete story, this case demonstrated how the use of a discovery product aggregating data from multiple vendors can be complicated for librarians to untangle. As with the case of PMLA, librarians troubleshooting vendor data need to understand where the data comes from and work with stakeholders, including other librarians and vendors, to understand and attempt to resolve problems in library systems.

It is also important to understand that when a solution is out of librarians’ hands and dependent on factors such as providers’ development timelines, it is important for providers to communicate about those factors, such as their development schedules, to librarians who must responsibly keep their customers apprised of these situations beyond their control. We feel for our public services librarians, such as our Humanities Librarian, who will undoubtedly encounter the same recurring and new problems when providing services to library patrons seeking discovery and access to the Libraries’ resources.

Conclusion

The methods and tools for creating the PQDT knowledge base collection have supported the creation of many others. In addition to subscription databases, the Discovery Librarian has developed and contributed a number of open access collections (which also includes collections whose titles are in the public domain) to the WorldCat knowledge base. These open access collections include the University of Nebraska-Lincoln Zen books, Indiana Authors and Their Books from Indiana University Libraries, the Illinois Open Publishing Network, University of Nebraska-Lincoln Open Access Journals, ACRL Open Access titles, and more. The Discovery Librarian is looking into additional avenues for sharing these KBART files, such as sharing them on GitHub in addition to sharing them via the Library.

While the automated KBART feed is an incomplete story, this case demonstrated how the use of a discovery product aggregating data from multiple vendors can be complicated for librarians to untangle. As with the case of PMLA, librarians troubleshooting vendor data need to understand where the data comes from and work with stakeholders, including other librarians and vendors, to understand and attempt to resolve problems in library systems.

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Endnotes

3. WorldCat is OCLC’s catalog record database.
4. This number excludes copy catalogers activating individual title access in WCWB collections and making minor adjustments, i.e., adding or revising the order of the ISBN fields in the local catalog’s vendor records.
7. The phrase “master record” here and throughout the paper refers to records from OCLC’s WorldCat database.
How the University of California, Irvine Libraries Increase the Breadth of their Collections While Dealing with Reduced Cataloging Capabilities

by Joshua Hutchinson (Cataloging and Metadata Librarian, University of California, Irvine) <jchutchi@uci.edu>

Introduction

This column will explain the procedure and reasoning behind the University of California, Irvine (UCI) Libraries’ decision to do selective outsourcing of material in languages for which the library does not have cataloging capabilities. UCI was founded in 1965 and is an R1 public university located south of Los Angeles in Orange County, California. It has over 35,000 students and offers almost 100 undergraduate majors. To support these students and the over 5,000 academic staff, the UCI Libraries have three locations (the main library, a science library, and a medical library), along with an affiliated law library that has its own technical services) and the Cataloging and Metadata Services Department has over a dozen employees: four librarians and ten staff members. Besides a special collections backlog of several thousand volumes, there isn’t a significant cataloging backlog of modern material.

The Problem

The UCI Libraries collect widely and actively in a variety of languages including Japanese, Chinese, Korean, French, German and Spanish. Historically, the Libraries’ cataloging department had in-house capability for all those languages. However, with a smaller department, there is no longer the ability to do original cataloging in some of these languages. In addition, the Libraries collect irregularly in other languages for which there is no in-house cataloging capability—notably, recently there has been an effort to collect Armenian-language material in response to the growth of an Armenian Studies program on campus.

The library receives regular donations in Korean, and purchases significant amounts of Korean-language material—primarily books, DVDs and audio CDs. Beginning in 2016, the Library received three large donations, totaling several thousand volumes, of Armenian-language books that formed the basis of an Armenian collection. The Libraries have an approval plan and several standing orders for German books.

The Cataloging and Metadata Services Department has chosen to use a variety of different methods to catalog in these languages in order to most efficiently and effectively make material available. The method chosen depends on a variety of factors including the format of the material, additional language capability elsewhere in the library, and the number of items requiring cataloging.

The Process

**Korean** — Purchased and donated Korean material arrives from the Acquisitions Department with records in the Alma library services platform. The Acquisitions assistant downloads a record from OCLC where possible and otherwise enters a brief record. The PO Line number is written on a flag and inserted in the book to assist in retrieving the record. In the case of material with good records in the OCLC database, the cataloger double-checks bibliographic details such as size and pagination, and finalizes the bibliographic, holdings and item records. In cases with poor or no records in the OCLC database, the cataloger can recheck OCLC for new or improved records. If there is no good copy, a determination needs to be made about whether the existing record can be improved by the cataloger working in conjunction with colleagues with Korean language expertise.

The UCI Libraries has been until recently in a fortunate position in that one member of the Acquisitions staff is a native Korean speaker, and the library annually hosts a Korean Foundation intern for an 11-month period. The Korean-speaking Acquisitions assistant has recently left, which may necessitate significantly more outsourcing of Korean material. The cataloging librarians can work with the Korean Foundation intern in order to create minimal-level catalog records in conjunction with tools such as the Google Translate app. This process is time-consuming for both the intern and the cataloger and results in minimal-level catalog records, so is not a solution to all Korean materials. However, when an item has been requested by a library patron and needs to be made quickly available, this solution is acceptable.

**Armenian** — Unlike with Korean materials, nobody on the library staff can speak, read or even identify Armenian characters. It is difficult to search for Armenian books without knowing the language. Google Translate doesn’t offer character recognition for Armenian. The Libraries hired a graduate student in the Armenian program to help identify OCLC records for donated Armenian books. Most were 20th century imprints and duplicates from other academic libraries, and so there were high-quality records in the OCLC database. Once the records were identified by the graduate student, the book was passed to catalogers who dealt with the record import, local holdings and item records, and the physical processing. Over the course of two years and two graduate students, this process was lengthy but successful — OCLC records were identified for almost all the books, working with the graduate students was a pleasure, and the Armenian collection now sits on the shelves in the library. However, some books were left over with no identifiable records in OCLC. Fewer than a dozen books lacked good records in OCLC. These are currently waiting to be sent for outsourced cataloging but have a low priority.

**German** — German books are almost all purchased rather than donated. They are generally purchased upon publication and sometimes arrive before there are good records in OCLC. While no catalogers speak German, it is a language that uses the Roman alphabet and so those who do not know the language are still able to successfully search OCLC for the items. In order to improve the department’s language capabilities, one cataloger is currently taking German language classes on campus. However, while that helps with grammar and vocabulary, the cataloger is far from fluent. When titles arrive that do not yet have a good record in OCLC, a calculation must be made about whether to wait for another — and expert — cataloger at another institution to complete the cataloging for this material, or to improve the record to the best of UCI’s ability in order to get it to the shelf as quickly as possible. Thankfully, for mainstream academic works in German, enough other libraries catalog these books within a week or two of arrival (most probably have similar approval plans with the same vendor) that UCI never has to wait for long. Our German cataloging is an example of the cost savings inherent in cooperative cataloging in the contemporary environment.

The Outcome

German acquisitions are all newly published mass-market books. Therefore, the decision has been made that German books are ineligible for outsourced cataloging because there is less of a problem finding a matching record in OCLC within a reasonable time period. Armenian and Korean materials, on the other hand, have been successfully outsourced, and it has been a positive and worthwhile experience for the UCI Libraries. The Libraries has had an ongoing relationship with the company that provides outsourced cataloging and has
Outsourced Cataloging of Materials ... from page 21

gradually regularized its outsourcing process to make it part of the foreign language cataloging workflow.

The procedure is as follows. The cataloging librarian accumulates enough material for an efficient shipment (generally between ten and twenty-five books at a time, usually all the same language) and adds barcodes to the books or DVDs. These barcodes enable the rapid creation of a “set” within Alma, and the creation of a spreadsheet of those titles being sent. Barcoding the material also reduces reliance on slips inserted in the books in order to match books with records. The librarian then contacts the outsourcing company, alerts them that a shipment is on the way, and packs the box. Once the material returns, generally about six weeks after dispatch, the librarian unpacks the box, matches the books with the records that have been put into the Libraries’ online save file in OCLC Connexion, and does the final steps (downloading the record into the Alma LSP, marking the call number on the title page) to enable the material to get to the shelf.

Lessons Learned

While outsourcing is not a major part of the UCI Libraries’ cataloging workflow, it does enable the library to catalog and add to its collection material that would otherwise be impossible to add without significant staff training in new languages. It allows the library to be responsive to changes in teaching and learning focuses on the UCI campus, and it allows for a greater diversity of languages and material within the Libraries’ collections. Making use of our cataloging partners, UCI Libraries can be much more flexible in terms of our collections and cataloging output.

Using companies that provide cataloging services allows the UCI Libraries to collect in areas that would otherwise present significant cataloging challenges. While outsourcing cataloging has its own challenges (it costs money and reduces already tight budgets; it takes time to collect, pack and send the material, and then takes time at the end of the process to reconcile the new records and to unpack the boxes; and it presents a challenge simply because it represents a deviation from the regular workflow), UCI has benefitted significantly from its ability to outsource cataloging. It saves time and money while allowing the Libraries’ collections to be wider and broader than would otherwise be possible.

Going forward, UCI Libraries will probably expand its use of outsourced cataloging as it loses further language capability from within its Acquisitions and Cataloging departments. It is also probable that this will be expanded to other languages as the University creates new programs and the library adds new languages to its collection. It is hoped that there is some scope for expanding the amount of shared cataloging within the University of California system.

For any other library considering outsourced cataloging, the experience of UCI Libraries has been generally very positive. While the turnaround time means that books are cataloged more slowly than if there were an under-worked cataloger with excellent language skills at UCI, those conditions do not exist. The considerable cost of outsourced cataloging remains considerably less than hiring and training a new cataloger and enables the Libraries to remain far more flexible in terms of language abilities. It is important for a library that is thinking about beginning a program of outsourcing small batches of cataloging to think hard about the process and how records will be retrieved and marked (whether they will be sent with barcodes, what the status will be set as, whether there is a note in the location, etc.), but due to the reliable nature of the process it does not require the same solutions as relugating a book to a semi-permanent backlog might.

Wandering the Web — STEM and STEAM: Selected Ideas for Children’s & Young Adult Programming

Compiled by Roxanne Spencer (Associate Professor and Coordinator, Beulah Winchel Education Library, Western Kentucky University Libraries) <roxanne.spencer@wku.edu>

Column Editor: Jack G. Montgomery (Professor, Acquisitions and Collection Services Librarian, Western Kentucky University Libraries) <jack.montgomery@wku.edu>

STEM and STEAM are, well, still going full-steam ahead (sorry!)! If your batteries are running a bit low on makerspace ideas, get your engines revved up again by following some of the examples, lesson plans, and templates here. These resources are from a variety of websites, commercial and noncommercial, to consider for programming ideas for engaging children and teens in school and public libraries, and to encourage future teachers and school librarians (Note: Mention of commercial websites does not constitute an endorsement of the vendor’s products by the author or by this publication. Included for informational purposes only.).

Steam-Powered Family — https://www.steampoweredfamily.com/steam-activities/“Ultimate Guide to STEM Activities – with over 100 Activity Ideas!” This mom-blog is by a homeschooler with a background in animal sciences, computer programming, and psychology. She researches childhood trauma and mental health, offers definitions and resources for families and educators to begin or expand their STEM and STEAM activities.

DEMCO — https://ideas.demco.com/blog/8-inexpensive-stem-ideas-pokemon-go-library/ — the well-known library supplier offers plenty of ideas through their blog, activity guides, webinars, and idea gallery, as well as their products for school, public, and other types of libraries. In this short piece, find information on Pokémon GO and affordable STEAM ideas for library programming.

We Are Teachers — https://www.weareteachers.com/steam-books-classroom-library/ — provides a variety of information and products on the teaching life. School and public libraries also will benefit from free printables and ideas for programming. This particular link includes 50 STEM books to consider for your library collection, including titles on coding, environmental titles, math concepts, and historical figures who changed the world.

STAR*net — https://www.star nettlibraries.org/steam-in-libraries/what-is-stem/ — Science, Technology-Activities & Resources for Libraries — offers extensive ideas and links to reliable sources for bringing STEM into the library. Among the information provided are links to a National Research Council Report, “Identifying and Supporting Productive STEM Programs in Out-of-School Settings”; the 2019 National Science Foundation’s “STEM for All Video Showcase”; as well as posters, presentations, and projects for libraries on STEM topics.

Microsoft Education Educators STEM Lessons — https://www.microsoft.com/en-us/education/education-workshop/default.aspx — presents “Hacking STEM Lessons & Hands-On Activities, with free lesson plans on a variety of topics from communication to models to space. Classroom kits are also available, which inspires public librarians to collaborate with teachers and support local school curricula. An Activity Library offers more lessons that can be adapted to other than classroom settings.

continued on page 32
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Homegrown Outsourcing: A Cooperative Cataloging Pilot Between Duke University and the University of North Carolina at Chapel Hill

by Denise Soufi (Middle Eastern Cataloger, The University of North Carolina at Chapel Hill) <dsoufi@email.unc.edu>

and Nanako Thomas (Catalog Librarian for Japanese Language Resources, Duke University) <n.kodaira@duke.edu>

and Natalie Sommerville (Team Lead, Monographic Original Cataloging, Duke University) <natalie.sommerville@duke.edu>

Introduction

The cataloging of non-Roman script materials poses special challenges that usually require a cataloger to possess the requisite language expertise. When an institution possesses many of these materials but is unable to hire the needed cataloger, a common solution is to outsource the cataloging to a vendor. In the case of Duke University and the University of North Carolina at Chapel Hill (UNC), however, the question was asked: would it be more cost effective and efficient to leverage the expertise of our own non-Roman script catalogers through an exchange of materials? As two of four member institutions of the Triangle Research Libraries Network (TRLN), this type of project falls well within the scope of TRLN’s mission “to marshal the financial, human, and information resources of their research libraries through cooperative efforts in order to create a rich and unparalleled knowledge environment that furthers the universities’ teaching, research, and service missions.” (“About.” TRLN, Triangle Research Libraries Network, https://www.trln.org/about/).

In October 2017, the TRLN Collections Council approved the proposal for a cooperative cataloging pilot between Duke and UNC as well as the formation of a task group to implement the pilot. The Cooperative Cataloging Pilot Task Group was charged with examining the logistics, workflows, efficiency, cost and benefits of TRLN cooperative cataloging compared to outsourcing, and Nanako Thomas and Denise Soufi were named the project managers at Duke University and UNC, respectively.

Steps Taken

With input from our supervisors and department heads, we first prepared a set of guidelines outlining cataloging procedures and workflows in a project charter and a cooperative cataloging agreement. In the charter, we defined the project’s objective as assessing the efficiency and cost-effectiveness of TRLN cooperative cataloging as compared to outsourcing, while factoring in the quality of the resultant bibliographic records. The project scope was limited to 100 titles sent by each institution for cataloging. UNC agreed to send 100 Arabic-language titles to Duke while Duke agreed to send 100 Japanese-language titles to UNC.

We set deadlines for deliverables and milestones, the most important being that the books would be sent out by the beginning of April 2018, the cataloging would be completed by June 22, and all records would be imported by the end of June. We also outlined our team members, their roles in the project and the estimated time they would spend.

In the agreement, we set down the details of how the project would be carried out. We decided to ship our books using the library truck that circulates among the four TRLN libraries. We barcoded the books prior to shipment and tracked their location using local procedures. We agreed to catalog according to our own institutional standards, using the Worldcat authorization provided by the owning library’s institution and following the BIBCO Standard Record. UNC staff set up Google spreadsheets for recording all cataloging statistics. For each record, Nanako and Denise recorded the type of cataloging along with the Worldcat number and barcode. For type of cataloging our options were New, a record created from scratch; Enhanced Copy, a record created by another institution that we edited in Worldcat; or Copy, a record created by another institution that required no edits. For Duke, Denise recorded the barcode in the record and saved it to Duke’s online save file in accordance with Duke’s needs for end-processing. The catalogers also tracked what we called peripheral cataloging, which we defined as any cataloging tasks that would not normally be provided by an outsourcing vendor, such as creating authority records and Program for Cooperative Cataloging (PCC) level bibliographic records. In addition to recording the type of cataloging, Nanako and Denise kept track of the time spent cataloging, recording the total amount of time in hours spent creating, enhancing and copy cataloging bibliographic records. They recorded separately the amount of time in hours spent on peripheral cataloging work.

Although we assumed a higher level of cataloging quality that we could not expect from a vendor, we thought it was important to perform some quality control in order to compare our results with vendor records. We agreed to take a random sample of one-third of the records to check for the accuracy and completeness of the subjects, classification and MARC coding elements.

In the agreement we also gave a brief outline of the local procedures we would follow for importing the records. Natalie Sommerville was able to leverage an existing service in Duke’s integrated library system (ILS) to load the records cataloged by Denise; while at UNC Denise and various team members developed a workflow to batch import the records cataloged by Nanako into UNC’s ILS. Thanks to our supervisors’ prioritization of this project, Nanako and Denise were able to complete the cataloging by the end of May, and Natalie and Denise were able to complete record loading by the end of the June deadline.

Results

The following table includes the raw data listing the number of titles cataloged by Nanako and Denise and the number of hours spent on cataloging. Of significance is the fact that Nanako spent nearly twice as much time cataloging as Denise did. This is due to two factors. First, three-quarters of the Japanese-language titles required original records, whereas more than half of the Arabic-language titles were copy or enhanced copy. Second, about 20% of the Japanese-language titles were in an older, difficult-to-read script requiring more cataloging time. Additionally, in the process of cataloging Denise recorded four extra titles. One was simply an extra book. There was also a group of four books that had presumably been sent as a four-volume monographic set; however, in Worldcat each volume had been cataloged separately as part of a series, and, after consulting with Nanako, Denise used those records instead of creating a new one.

<table>
<thead>
<tr>
<th>Number of Titles Cataloged and Number of Hours Spent Cataloging</th>
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<tbody>
<tr>
<td><strong>Number of Titles</strong></td>
</tr>
<tr>
<td>----------------------</td>
</tr>
<tr>
<td><strong>Original (New)</strong></td>
</tr>
<tr>
<td>Duke</td>
</tr>
<tr>
<td>UNC</td>
</tr>
</tbody>
</table>

Next is a table which summarizes the time spent on non-cataloging tasks, some of which were performed by other colleagues; these tasks include book selection, tracking and packing/unpacking, quality control and importing records into the local ILS. Again, there are a few areas of difference. First, UNC spent less time on book selection because the Chinese language cataloger had sorted the Japanese-language books continued on page 25
requiring original cataloging in the previous year. So, it was straightforward for her to select books to send to Duke. Second, UNC’s time spent on importing records is much higher than Duke’s because it includes the development and documentation of a workflow to batch import records; in the future our numbers should be similar.

Time, in Hours, Spent on Non-Cataloging Tasks

<table>
<thead>
<tr>
<th></th>
<th>Book Selection</th>
<th>Tracking, Packing, QC</th>
<th>Importing Records</th>
<th>Total Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duke</td>
<td>7</td>
<td>4.5</td>
<td>5</td>
<td>16.5</td>
</tr>
<tr>
<td>UNC</td>
<td>2</td>
<td>5.5</td>
<td>19.5*</td>
<td>27</td>
</tr>
</tbody>
</table>

*Includes time spent on development and documentation

In order to compare with vendor outsourcing costs, Natalie and Denise calculated the cataloging cost per title based on the hours logged by the pilot project catalogers and the average cataloger’s salary, including benefits, at their respective institutions. They also included time spent on other tasks that would not be performed for vendor cataloging, namely tracking, packing and unpacking books. Time spent on importing records was not included since similar work is involved with importing vendor-created records.

For comparison, Natalie supplied data for the average cost per title paid to Duke’s non-Roman language outsourcing vendors based on costs during the years leading up to the pilot project, as well as Duke’s internal costs for scanning and quality control. The cataloging cost is for original cataloging, which, as defined by Duke, consists of both new records and enhanced copy records. The scanning cost is based on the time spent scanning a certain set of pages from the book (generally the cover, spine, title page, title page verso, colophon, table of contents and the first few pages of the introduction), which are then sent to the vendor for use as the basis for cataloging.

The following chart illustrates a comparison of costs for vendor cataloging, both with and without quality control, and cataloging by Duke and UNC, both with and without added peripheral cataloging work and quality control.

Vendor “cost per title plus” includes quality control. Duke/UNC “cost per title plus” includes peripheral cataloging and quality control.

Several caveats must be noted in order to correctly interpret the data. First, the fact that Duke’s cost is dramatically higher than UNC’s is due not only to the slightly higher average salary, but also to the fact that Nanako spent more time cataloging due to the special needs of the Japanese books mentioned previously, particularly the fact that most required new records. While Duke’s cost appears to be on par with the vendor cost, the latter is based on a more even mix of new and enhanced copy titles. Second, it must be noted that the cost per title spent on quality control for Duke- and UNC-created records was minimal (approximately $.50/title vs. $2.38/title for vendor records) due to the high quality of records created at both institutions.

Duke aims to perform systematic quality checks on vendor records for approximately two months. Therefore, for long-term projections of cost, we thought it fruitful to compare the cost of vendor records without the cost of quality control with the average cost of Duke/UNC records with peripheral cataloging work but without quality control.

Not only is the Duke-UNC average cost significantly less than the vendor cost, it includes the bonus of peripheral cataloging work such as NACO and PCC records.

**Recommendations**

Based on the cost comparison alone, we recommend pursuing consortial cooperative cataloging projects when there is language expertise available in the network. In addition to lower costs, there are added benefits that cannot be provided by a vendor. First, the quality of cataloging is higher and more reliable, due to both the expertise of the catalogers as well as the availability of the entire book rather than a few scanned pages. Second, the catalogers were able to provide the benefits of NACO and PCC records, and both were willing to submit classification and subject proposals had they been necessary. This extra work is credited to the owning institution and enriches records that will likely be used by other libraries.

However, several factors should be considered before initiating a cooperative cataloging project. First, the fact that the books are shipped out means there is potential for damage or loss. We minimized this risk by using the truck that routinely delivers library materials among the TRLN institutions. Second, urgent local needs may take priority over the cooperative cataloging work, causing unwanted delays. Strong support from supervisors to prioritize the project helped us to meet our deadlines and ensure timely completion.

Third, a project cataloger may decide to leave his/her position, resulting in the loss of a language expert. There is, unfortunately, little that can be done to allay this risk. Lastly, the amount of time spent cataloging may be unbalanced between the two institutions; while the number of new records to be created can be ascertained, it is more difficult to determine the difficulty of cataloging the materials. Although we did not try to address the imbalance we experienced, in the future it may be possible for the institution that is spending less time cataloging to take on extra materials to even out the time commitment by each institution.

We highly recommend that any institutions undertaking a cooperative cataloging project create a project charter as well as an agreement that outlines detailed cataloging procedures, including any local needs, and a workflow for shipping and tracking materials and tracking data. We also recommend framing cooperative cataloging work as a project that can be prioritized with sensible deadlines. The framing should include an in-depth discussion of scope and sustainability within the local context. For example, depending on the size of the backlog and the available staff, some institutions may choose to limit the scope and continued on page 26
Outsourcing Technical Services in a Health Sciences Library

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and Melanie McGurr (Head, Electronic Services, University of Akron) <Mmcgurr@uakron.edu>

Introduction

Outsourcing in technical services was an especially hot topic in the late '90s and early 2000s. Most libraries, even in a smaller way, have used outsourcing to complete a project or wrap up a workflow. After decades of fixing problems and smoothing complications between vendors and libraries, outsourcing can be a relatively seamless process if the library staff and administration are all on board and educated about the project, workflow, or position being contracted out. Everyone involved should know why the job is being outsourced and the implications of outsourcing the work. If there is a factor that affects the work, however, outsourcing can become a complicated, time consuming, and overly expensive process. This article explores the challenges of outsourcing technical services when you have no technical services staff, how to overcome those challenges, and tips learned from successful and unsuccessful attempts to help administration understand why technical services skills are vital to a library's success.

Background

The Northeast Ohio Medical University (NEOMED) is, at 46 years old, a young institution. As a standalone, public medical, pharmacy, and graduate school, its beginnings were a cooperative effort between four northeast Ohio public universities: Kent State University, The University of Akron, Youngstown State University, and Cleveland State University (referred to as regional partner universities). Because the University does not have its own hospital, regional hospitals serve as affiliates and historically is responsible for library services at the hospitals are included in this hospital, regional hospitals serve as affiliates. Because the University does not have its own library and the libraries formed a consortium that still survives today. The consortium consists of hospital libraries and the NEOMED library.

NEOMED library administers the library services platform (LSP) that they share with the hospital libraries and historically is responsible for every aspect of the cataloging process. The consortium also does some collaborative purchasing and training when possible and meets as a group 2-3 times a year. The partnership was formed when the hospitals and the NEOMED library presents unique challenges for technical services. The hospital libraries have a lot of autonomy, some have their own proxies and discovery layers, but they also depend on the NEOMED library for all their cataloging and loading of electronic records. Working in a shared catalog with multiple locations with local practices can be a challenge, even for an experienced cataloger, without being trained on local practice.

As with many libraries, staff numbers at the NEOMED library have steadily declined in the last decades. Demetria Patrick is the Technology Librarian and manages the LSP as well as other systems and implements emerging technologies. When she started in 2010, the NEOMED library had a director, two reference librarians, three full-time public services staff, one technical services librarian (responsible for cataloging, acquisitions, collections, and electronic resources), one full-time staff cataloger, and one part-time cataloger. Melanie McGurr was hired in 2013 as the Assistant Director of Content Strategy (hereafter called Content Strategist) where she managed technical services which encompassed collections, cataloging, acquisitions, and electronic resources. She was also an interim Chief Medical Librarian for a portion of her three years at NEOMED. The title for the head of the library has changed from Chief Medical Librarian to Director in the last five years. When McGurr left for another position at one of the regional partner universities in early 2017, there was no one left with experience in collections, acquisitions, or cataloging. Unfortunately, her position was not approved to be filled by the University administration, although library administration understood the importance of the position.

The lack of a Content Strategist position was a problem for the NEOMED library as well as the seven affiliated hospital librarians mainly because this position was responsible for cataloging for the whole consortium. Despite the ongoing efforts of the library administration and staff working to advocate filling the position, there is still no full-time staff to complete technical services work. Currently, in the NEOMED library, there is one reference librarian, the Technology Librarian, two and a half public services staff, one part-time graduate student, and an interim Director who is also responsible for another department at the University. In 2018, this staff level was serving 942 students and hundreds of staff and faculty. Full-time faculty, along with doctors, and pharmacists from around the region teach classes at the university and are supported in their teaching by the library.

When the authors worked at the institution together, there was also a long period of time when the library did not have a reference librarian. The purpose for mentioning this is that with three, and sometimes two, librarians at the library, there was very little time for cross-training. The Content Strategist was not trained to work much in the system and the Technology Librarian was not that familiar with the intricate aspects of technical services including cataloging and electronic resources. Despite good intentions, the frequent change in leadership and staff hindered their cross-training process.

Literature Review

Perhaps the most famous outsourcing story in technical services is that of Wright State University, who outsourced its entire cataloging department in 1993. This wholesale outsourcing of the department served as a catalyst for outsourcing discussions at the academic level for years. In the search of the literature, outsourcing stories abound, from publics (Hawaii Public and Fort Worth Public Libraries) probably being the most discussed, academics, and law libraries. Out of the literature, only one article was on health sciences libraries and outsourcing, specifically on the outsourcing of collections.

Therefore, when facing the idea of outsourcing at a health sciences library, the literature offers little help in specifics, but a lot of discussion and tips for general outsourcing. One of the largest problems with outsourcing at NEOMED, is that there is no one at the library who fluently “speaks” cataloging, acquisitions, or collections. As Hirshon and Winters discuss in their book, Outsourcing Library Technical Services, “Outsourcing brings an added complication: you must understand what you are doing before you can outsource it. Without in-house expertise to make effective decisions, the library could find itself inviting the foxes into the chicken coop.” In the case of NEOMED’s library, the concern was less
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about the vendors having too much power, and more about the lack of understanding between the vendors and the library. The library was not always sure what to ask for, and the vendors did not always understand how to support the library’s lack of knowledge.

### Outsourcing Strategies

Ohio has a collaborative state university system and NEOMED library has a tradition of collaborating with vendors and other libraries, including numerous academic institutions, on various projects. As a founding member of OhioLINK, a large, state-wide consortium, it is natural for the staff to turn to their regional partner universities and state partners for support. OhioNET is a regional consortium that offers discounts on resources and consulting services, including training, loading electronic records, and systems work. OCLC, as the mainstay of cataloging and an Ohio company, was also a natural place for the staff to turn to for outsourcing help. Another source of assistance were the regional partner universities and hospital libraries.

Hospital librarians were previously trained to add item records, add copies, or make edits to their own print items, but did not have cataloging or bibliographic record privileges. When NEOMED lost the Content Strategist, a backlog of print books for the library and hospital libraries began to accumulate. The need for course reserves, reference books, and general collection monographs to be processed was pressing. With no immediate permission to hire a cataloger, library administration decided that on-the-fly records could be a relatively easy solution to the problem for print materials. This decision was met with concern from some staff because they felt this temporary solution would need a large clean-up project. The Technology Librarian was asked to create instructions for making on-the-fly records. These instructions were distributed with the temporary situation in mind because the NEOMED library staff believed that a cataloger would be hired soon.

The on-the-fly situation began as a short-term solution but is still going on over two years, and more than 1000 records, later. Most of these records are true on-the-fly records, very sparse with no subjects, OCLC numbers, and sometimes no call numbers. A few hospital librarians filled out as much information as possible on the record to make the record look and act as a fully cataloged MARC record. Most of the hospital librarians only put records in for new print materials, but the lack of thorough training, cataloging experience, and communication caused duplicate records and other errors to be created. These on-the-fly records alleviated a pressing problem by making the materials findable but caused a larger one. The records were suppressed from view in the OhioLINK catalog, the holdings were not set in OCLC, and the inconsistency of the records affected the integrity of the catalog. To solve the problems, the on-the-fly records would need to be either batch processed by a vendor who could handle this variety of records or they would need to be fully cataloged one-by-one.

Another issue was the electronic records loads from OhioLINK and other vendors. As a consortium with a core of collected resources, OhioLINK distributes electronic records for new e-journals and eBooks frequently and includes records for replacement and deletion. When the Content Strategist left, no one had experience with record loads, so the catalog was outdated. As with the print records, the library needed the backlog to be addressed and a workflow for ongoing loading.

Several plans were suggested, including outsourcing the cataloging work to one of the regional partner universities. The Chief Medical Librarian continued to express the importance of hiring a Content Strategist to the University’s administrators, but the position was not approved to be filled. He then presented a proposal to administration that suggested the library hire a consultant and eventually received permission to move forward with hiring a consultant to catalog the backlog. Although the cataloger had experience, he did receive health sciences and local practice training from the former Content Strategist. Because McGurr worked close by at a regional partner university, she was able to help her former co-workers. The consultant soon found a full-time job, and the Chief Medical Librarian attempted to find another consultant or part-time, temporary cataloger without success. After the Chief Medical Librarian left the University in the summer of 2018, the staff began looking into other options for cataloging.

A staff member contacted OhioNET (for electronic resources) and OCLC (for print cataloging) to investigate how the vendors could help with the backlog and ongoing cataloging. They both returned a quote for the contract of work and the staff discussed the implications of moving forward. In late 2018, a new Interim Director began working at the library and the staff presented the problem and proposals as potential solutions for the backlog. After multiple conference calls and emails between the staff and vendors, the staff agreed that the proposed projects were the best solutions to quickly fix the problem. The Interim took the proposals to University administration, and after some back and forth about ongoing costs versus one-time funding, the library was granted permission to pursue the contracts with OCLC and OhioNET.

The library was interested in contracting with OhioNET to load a backlog of electronic records from OhioLINK and other vendors. The library has a long-standing relationship with OhioNET because they serve as a vendor for purchasing resources and hosted the LSP for several years. The staff at the library were confident working with OhioNET staff, and OhioNET understood the limitations of the library’s knowledge in cataloging and electronic resources. OhioNET caught up on the backlog of electronic resources, which were easily retrievable from OhioLINK and the vendors, and continues to load records on an ongoing basis.

OCLC was contacted concerning cleaning up the on-the-fly situation and ongoing cataloging. Before moving forward with a contract for work, OCLC asked the staff to complete a project questionnaire to get a better sense of what was needed. This questionnaire would be used to help OCLC generate conditions to best serve the library’s needs. The Technology Librarian and Reference Librarian worked together to complete it but had to eventually schedule a conference call with OCLC for further clarification about the form. The general questions regarding the local practices, number of titles, and physical processing were easy to answer. The form also included more advanced questions regarding MARC fields, indicators, and subfields that required a level of expertise that did not exist at the library. Although the Technology Librarian was familiar with the major MARC fields to manage the project, she still had to seek help and clarification from the former Content Strategist and the LSP vendor to answer the advanced questions. As the Hirshon quote stated earlier, the need for someone with the proper experience to interact with vendors is imperative.

Although the OhioNET project got off and running with little trouble, the OCLC project required a lot of investigation and work. After making the decision to put the project on hold until after the beginning of 2019, the Technology Librarian made little progress in completing the questionnaire in a satisfactory manner. After sending the completed form to OCLC, the Technology Librarian and Interim Director were informed that the submitted information was not complete enough for OCLC to automate the process.

To help the Technology Librarian better answer the questionnaire, OCLC sent a few test records to load in the LSP. After unsuccessfully trying to load the records the Technology Librarian reached out to the former Content Strategist for direction. The former Content Strategist asked her colleague from her new institution to help troubleshoot the issues. Although the issues were resolved and the records were successfully loaded by adjusting the process and load tables, the Technology Librarian understood that fixing this issue would not completely help her answer all the questions on the OCLC form in a timely manner. The Interim Director and Technology Librarian decided to put the OCLC project on hold once again because it was too time intensive for the Technology Librarian.

As the OCLC project unfolded, a library search committee was simultaneously looking for a part-time Cataloging Specialist to help manage the OCLC print backlog project, with the Technology Librarian managing that person. The Interim Director contacted a regional partner university with a library and information science graduate school program for help with finding potential candidates. Her contact at this library suggested some names of student workers, and the library moved forward with the interview process. Unfortunately, the search committee failed to find someone for the Cataloging Specialist position.
Outsourcing Technical Services ...

from page 28

The Cataloging Specialist position transitioned into a Graduate Student Assistant (GSA) position in the hopes of finding a student needing experience. Fortunately, the student contacts shared by the regional partner university were interested in an on-campus interview, and the library successfully hired a GSA worker with cataloging experience. After evaluating the backlog and the GSA’s experience, the library staff decided to put the OCLC project on hold indefinitely, and the GSA helped the library move forward with the backlog project locally. The GSA worked on updating documentation, processes, and procedures and shared them with the affiliated hospital libraries. Although the library believes that the GSA can get them through the backlog and help them build up documentation and cross-training efforts to move forward, OCLC is still a possibility for the future.

Conclusion

Currently, the library has a part-time GSA processing print material and OhioNET loading electronic records. Some work is still not being completed; no true collection development is being done, and licensing is handled by a staff member and the Interim Director. There is not the time or expertise for database maintenance, deselection, or other projects. Although not ideal, the situation is an improvement from the last two years. The current fix is only possible because of the tenacious work of the staff and library administration to find alternatives to fill the gap. Much of the work is covered this way, but it is a long road for the rest of the staff, especially the Technology Librarian who is currently managing all technical services projects and slowly incorporating more clean-up tasks to restore the integrity of the catalog.

The following suggestions come from NEOMED library’s experience, either as the catalog.

Try partnering with a library that can help you move forward, such as fellow consortium members, or a larger school that might be willing to work with you. Approach consultants and vendors of all types, individuals or companies. Even if they cannot do the outsourcing work for you, perhaps they can help interface with the vendors or hire knowledgeable students. Ask on listservs, including listservs at library schools, if anyone can suggest solutions or would be interested in working as a consultant. The NEOMED library tried many of these ideas and found that a combination of a company/vendor and a student works for them for now. This is not a solution that promotes growth, however, and it isn’t a permanent fix.

Complete a time and/or budget study for how much time is taken up by liaising with vendors and what is being done versus contract costs to show administration the difference. Also, compare the cost of a full or part-time employee to what you are paying for outsourcing.

Ensure that university and library administration understand that many librarians are each differently trained. A cataloging or electronic resources librarian is trained specifically for a certain job that another librarian might not be able to take on.

Be prepared to go to administration about a workflow or position, using any data and/or research that you can gather. Keep this information up to date. If the request does not work the first time, you will have the information for the next try. Make it clear what is one-time and ongoing funding to avoid any confusion or disruption in workflow.

Survey and/or get letters of support from other stakeholders, like faculty, consortium members, and students, if you have that option. Use a recent internal review from the university or complete your own self-study using library staff or an external reviewer.

The conversation about outsourcing that arose in the 1990s never disappeared, but the discussion has new dimensions now. NEOMED’s most pressing challenge is its lack of technical services expertise in a consortium that is depending on that expertise and complications.

cated by the fact that no one on staff “speaks” enough technical services to make negotiating outsourcing easier. The outsourcing situation at NEOMED library is a small example of what could potentially become a much bigger problem. Declining enrollments, tight budgets, and other current trends could bring more staffing challenges, and outsourcing has the potential to become even more complicated.

References


Endnotes


Research. CIBER’s expertise lies in making sense of how very large numbers of people behave and consume in the digital environment. They map, monitor, and evaluate digital information systems, platforms, services and roll-outs using innovative research methods. What a mouthful! http://ciber-research.eu/ CIBER_Research_Ltd.html

It has happened! The fascinatingly opinionated Mark Herring will retire as Dean of Library Services at Winthrop University’s Dacus Library in June 2020. I told him that we want him to continue with his columns in the new year! Congratulations, Mark, retirement is pretty special!

Saw that Allen McKiel Dean of Library and Media Services at Western Oregon University is celebrating 12 years of service at Western Oregon. It has been too long since we heard from Allen! Did you know that Allen started as a programmer analyst? He merged his technical skills with librarianship with two library software developers — OCLC and NOTIS.

Mike Shatzkin has been at the Idea Logical Company, Inc. for 41 years! He founded the company in 1979 which consults to book

Rumors

from page 12

(nications) and her Penthouse Interview https://<ytoutu.be/Oafwv72pyB8>


Speaking of which, the energetic Mr. Watkinson has just celebrated 18 years at CIBER

Continued on page 37

Against the Grain / December 2019 - January 2020 <http://www.against-the-grain.com> 29
Introduction

Within approximately a decade, McConnell Library, Radford University went from in-house cataloging and processing, to outsourcing bibliographic records and processing for books from our primary vendor, to going back to in-house processing while continuing outsourcing of bibliographic records. While outsourcing is no longer seen as the enemy as it once was, it is also no longer seen as an unquestionably accepted practice. A strong emphasis on immediate access has gained traction over record quality.

Radford University is a public university in Southwest Virginia with the Carnegie Classification of Master’s Colleges & Universities: Larger Programs. Founded in 1910 as a teacher’s college, Radford is now a comprehensive university with more than 9,000 students. The university has over 30% first-generation college students and is well known for its strong faculty/student bonds and service ethic. McConnell Library currently has 29 librarians and staff providing collections and services to the university.

In May 2006, Kay Johnson was hired as Coordinator of Technical Services, which oversees library acquisitions, cataloging, and shelving. The Technical Services Department was comprised of three librarians, who hold faculty rank but are not tenure-track, and six classified staff members. There was a cataloging vs. acquisitions workflow in which cataloging of monographs and serials was handled by one group (Catalog Librarian plus two staff) and acquisitions of monographs and serials handled by another group (Acquisitions Librarian plus two staff). The Coordinator of Technical Services supervised the librarians and the two staff responsible for shelving and binding of monographs and serials.

Johnson came from a larger university that had outsourced bibliographic records and shelf-ready processing of books ordered from the library’s major book vendor. Johnson asked the Catalog Librarian, Elizabeth McCormick, to work with her to plan and implement outsourced cataloging.

Research and Planning

Johnson and McCormick worked together to write a justification for outsourcing and a draft workflow plan, which would be presented to the University Librarian. The original idea was to look at outsourcing the cataloging, invoicing, and shelf-ready processing of firm-ordered books. McCormick asked for pricing from the library’s contracted book vendor, YBP, and information about OCLC PromptCat processing. The final reasons for outsourcing were:

- Improved turnaround time from receipt of books to shelving;
- Possible redeployment of staff to other areas of the library needing more staff, mainly in Circulation.

Cost-savings was not a factor in outsourcing. Because student assistants are paid through the Financial Aid office, McConnell Library does not pay for student labor, which cancelled any argument in favor of saving money, and the vendor’s cost for monograph copy cataloging and physical processing was significantly higher than in-house costs.

McCormick and Johnson began discussions in late January 2007, and in February they traveled to nearby Virginia Tech to learn how they handled OCLC’s PromptCat processing. Because the cost to outsource the cataloging of bibliographic records was relatively affordable, unlike the cost to outsource the physical processing of the books, the decision was made to outsource to YBP’s service only the bibliographic records of available copy as a pilot project. If successful, further outsourcing would be considered, including paying for YBP to process books as shelf-ready. Also, because it was known in advance what books would come on the library’s approval plan from YBP, and because it was likely that full bibliographic records would be available for the majority of titles, the decision was made to receive records for only the approval books instead of the firm-ordered books.

Outsourcing Phase 1: Bibliographic Records

McConnell Library’s approval plan began in 2006. Newly received book shipments were placed on shelves in Technical Services for two weeks. This allowed librarians and departmental liaisons the opportunity to visit Technical Services in person in order to reject books or suggest edits to the approval profile, which would result in books better suited to teaching and research needs. Outsourcing of bibliographic records for approval books was accomplished between January and May 2007. McCormick and Johnson consulted frequently to discuss progress and challenges. Acquisitions and cataloging staff were included in discussions and testing. McCormick worked with YBP staff to set up the PromptCat profiling and managed the implementation.

OCLC lost the initial profile application sent in March 2007, thus delaying implementation until May. McCormick, Johnson, and cataloging staff researched the first books outsourced and Johnson contacted the vendor to fix a payment problem. McCormick edited the load profile to provide better quality records. The financial cost at the time was minimal at fifteen cents per record.

McCormick wrote procedures for loading the PromptCat MARC records into the Millennium system. The approval books would arrive and the data file would be available two days later. The file was brought into Millennium via FTP, where bibliographic and invoice records were created. The books were unpacked and left on the review shelves for two weeks. After that time, the books were sorted so that rejected books could be returned and approved books could be processed. Reports in Millennium, known as review files, were used for processing and invoice payment, as well as for catching any coding errors. After successful testing of approval book record loading, PromptCat bibliographic records became routine for the Technical Services staff. Bibliographic record content was accepted “as is,” and only brief records and records lacking call numbers were forwarded to the Monographics Librarian for upgrading.

Outsourcing Phase 2: Physical Processing of Books

In May 2008, McCormick submitted a cost estimate for physical processing to Johnson and the University Librarian, David Hayes. An updated estimate was submitted in July after using the more recent price sheet from YBP and final cataloging and acquisitions data from the 2007-2008 fiscal year. Three options were supplied: one based on keeping spine label printing in-house and two based on different types of spine labels that YBP could use. McCormick recommended keeping the label printing in-house at first: it was the cheaper option, would allow Technical Services staff to handle call number prefixes, and would allow staff to determine what did and did not work and to make changes as needed.

After receiving spending approval from the library’s Administrative Council, it was decided to go forward with receiving PromptCat bibliographic records for the library’s firm-ordered books. McCormick contacted YBP in July 2009 to begin the process. She continued on page 32...
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informed them of which subaccounts should be outsourced and the time frame for the library’s holdings to be set in OCLC. A second profile had to be set up with OCLC. Outsourcing commenced with the new fiscal year when orders started to be placed in September 2009.

By 2013, very few departmental liaisons came to the library to review the books, rejected books were minimal, and the approval plan profile had been modified to the extent possible. Johnson approached McCormick about outsourcing the physical processing of all books purchased from YBP. This meant the approval books could no longer be returned to YBP but it also meant a quicker turnaround from receipt to shelving for all YBP books. As part of the new process, the approval books would go straight to the stacks instead of undergoing a two-week review process in Technical Services. This would save time and effort for Technical Services staff and serve the library users better by providing the books promptly.

YBP’s processing of books began in August 2013 with the finished materials arriving in October. Some materials were not completely shelf-ready for a variety of reasons. Oversized materials needed a call number prefix but since the classification of a book into the oversize collection depended on the book’s being measured, this could not be done by YBP. Books for which there was no copy available were to be originally-cataloged in-house. Finally, sometimes the bibliographic record used by YBP did not have a call number at the time processing needed to be done. In those cases, a bibliographic record would be supplied but no spine label would be sent.

In 2015, McConnell Library migrated from Innovative Interface’s Sierra system to OCLC’s WorldShare Management Services (WMS). McCormick worked with OCLC and YBP to migrate outsourcing over to the new library management system. There were a few glitches and delays, but eventually outsourcing worked smoothly again. The OCLC master bibliographic record is the local bibliographic record for WMS libraries. For libraries like McConnell Library that are not part of the Program for Cooperative Cataloging (PCC), the ability to change the bibliographic record is limited. Migrating to WMS took away detailed local cataloging control and the need for authority work, thus adding another justification to accept outsourced bibliographic records as “good enough.”

In 2016, as part of a state-wide budget shortfall, public universities were asked to come up with 2%, 5%, and 7% proposed cuts. Radford University was no exception and each college on campus, including McConnell Library, had to find ways to cut costs at each of the three levels. Savings in processing time were weighed against the budget shortfall and the decrease of importance of the print book collection in comparison with the increased eBook collection. We proposed ceasing physical processing to save money for the library. While the cuts ultimately were not needed in 2016, they were in 2017 and cataloging and physical processing returned to CaTS. Electronic invoices continued to be generated by YBP so that holdings would be attached to the bibliographic records during the acquisitions process.

Conclusions and Recommendations
Cataloging and acquisitions staff had concerns initially about outsourcing because it affected their work, but those concerns are long over. They appreciate the efficiencies of loading order and invoice records and the time it gives them to tackle other work, including increased time required for electronic resources ordering, cataloging, and maintenance. They have also gained the opportunity to cross-train in other departments in order to help when staffing needs arise.

Outsourcing has been positive for McConnell Library, but it comes with costs. One can look at staff cost savings in comparison to outsourcing costs but the reality is that the personnel budget is different, and more stable, than the library materials budget. Johnson and McCormick would recommend outsourcing cataloging and physical processing to libraries that have the money to do so. Technical Services staff should be included from the beginning. Consult with other libraries and start with a pilot project that can be changed, expanded, or shut down as needed.

Wandering the Web
from page 22

Knowledge Quest STEM and STEAM Blog — https://knowledgequest.aasl.org/category/blogs/stem/ — includes school librarians’ experiences and recommendations for incorporating STEM and STEAM in school libraries, which can also be adapted for public library children’s and young adult makerspace and similar programming: 3-D printing, augmented reality, makerspace kits, monthly STEAM challenges and more can liven up children’s programming and offer suggestions for future educators and librarians.

Makerspaces.com — https://www.makerspaces.com/makerspace-guide-school-and-library/ — “Ultimate Makerspace Resource Guide” is a powerhouse of “101+ Makerspace Resources for Schools and Libraries.” From describing, defining, showing and telling to benefits of makerspaces, beginner guides, information for special education environments, materials and supplies, tools, and equipment, projects, furniture, storage, and more—librarians will revel in the hands-on world of makerspaces and will find just about anything they need to start, modify, or expand their program offerings.

PBS Kids: Design Squad Global — https://pbskids.org/designsqaud/ — The hands-on activities and videos from this site can be used in any educational setting to engage children and teens in STEM and STEAM projects. Lesson plans, activity guides, training, and more are available to encourage exploring, designing, and making, vetted by one of the foremost educational networks in the world.

S&W Worldwide — https://www.ssworldwide.com/stem?src=side2 — is an online family business, selling educational materials. However, they have an extensive list of blog posts related to STEM activities, including holiday crafts, invention convention ideas, DIY projects, as well as promoting their classroom supplies. Creative youth librarians can adapt the ideas and activities to school or public library programming.

Girlstart — https://girlstart.org/ — STEM curriculum and resources for all educators, as well as resources to promote girls’ advancement in STEM learning. Programs of interest to librarians for partnerships include Girlstart After School, Community STEM Education, and STEM Extravaganza. Geared primarily for schools, the programs and ideas can be inspiring to enterprising school and public librarians looking for opportunities to collaborate.

Streamlining Workflows: Combining In-House Cataloging and Outsourcing to Achieve Institutional Success

by Cecilia Williams  (Manager, Technical Services, Harris County Public Library, Houston, TX)  <cecilia.williams@hcpl.net>

and Nikita Mohammed  (Manager, Cataloging & Processing, Harris County Public Library, Houston TX)  <nikita.mohammed@hcpl.net>

and Amber Seely  (Division Director of Collections and Technical Services, Harris County Public Library, Houston TX)  <amber.seely@hcpl.net>

Introduction

Cecilia Williams joined Harris County Public Library (HCPL) in January 2017, bringing seven years of cataloging and project management experience, with a focus on workflow improvement between acquisitions and cataloging. As the new Technical Services Manager, overseeing Acquisitions, Cataloging, and Processing, Cecilia was tasked with improving the flow of cataloged and processed materials from the Administrative building to 26-branch locations while reining in ballooning processing costs from our primary book vendor.

Nikita Mohammed is the Cataloging and Processing Manager at Harris County Public Library, promoted in 2018. She began working at HCPL in August 2012 as a Catalog Librarian, soon after graduation from Library School, with cataloging and processing experience from a special library and a small public library system.

Amber Seely joined Harris County Public Library as Division Director of Collections & Technical Services in August 2016 after over a decade of progressive experience in Technical Services in both public and academic libraries. She was immediately handed a mandate for change — bestsellers were not hitting HCPL’s shelves fast enough and all reasonable efforts should be made to correct the situation.

Background

For more than 15 years, much of the work of cataloging and processing print material for Harris County Public Library (HCPL) was outsourced to vendors. The Technical Services Manager determined how much material was outsourced each month and Cataloging staff had very little idea about the amount and type of work to expect from week to week.

While on the surface this kept the workload light for a shrinking Cataloging and Processing staff, it limited our ability to provide a more flexible, customized collection to our customers. Staff throughout the system complained of slow turnaround times for on-order items to be cataloged and processed. Our turnaround time to deliver material to the branches was gauged in weeks, not days, and the uncertainty of work to be completed in-house created a feeling of vulnerability about job security. Changes were necessary for turnaround times to improve in-house, but we found that as we strengthened staff skills and leaned on our expertise, we could change our outsourcing model. In only two years, we transitioned from a system that outsourced 75% of our print cataloging and processing to completing 75% of our print cataloging and processing in-house, faster and more customized.

Based on early staff feedback and assessment, there were many challenges that Cataloging staff regularly worked around. One of the major revelations during early 2017 was how deeply issues with our workflow, ILS technology, and lack of documentation were negatively impacting staff productivity. By tackling the issues below, we found that we could take on larger problems and implement new tools with much more staff support and buy in, and ultimately, success.

Challenges & Solutions

Like many libraries, HCPL had developed a cataloging backlog over the years. In our case, there were a few contributing factors including: back-to-back retirements, staff turnover, an ILS migration, multiple administration building moves, lack of documentation, and Cataloger specialization. Our backlog was more than a few shelves of material requiring original cataloging — it was part of the normal workflow for multiple pallets of materials to be ordered simultaneously and then cataloged and processed over the course of months. Since the expectation was that those materials would take months to complete and there were no incentives to complete items by a specific time, finishing quickly might result in less work to do for the next several weeks. This was a major contributing factor to staff unease regarding job security.

Workflow

In 2012, Cataloging was structured with two Catalog Librarians and three Copy Catalogers, cataloging approximately 5,000 items per month. Catalog Librarians were importing bibliographic records into the ILS for themselves as well as for the Copy Catalogers. This workflow might have worked well at a small institution, but with the workload and schedules of the Catalog Librarians, it was hard to maintain a smooth workflow. Copy Catalogers often had to wait for their bibliographic records to be loaded in order to add the items in the ILS, and this delayed their productivity.

The Catalog Librarians tried different methods over time to ensure that they loaded records efficiently for the Copy Catalogers, but even after setting up a schedule for loading records, the Copy Catalogers had to wait until the next scheduled time or check if they had been loaded. Understandably, Copy Catalogers were reluctant to ask the Catalog Librarians about loading status due to the feeling of not wanting to inconvenience senior staff. As Cataloging adjusted the workflow, we incorporated a new improvement: every cataloger would now import their own records. After training, Copy Catalogers were able to work independently and efficiently. The workflow was so well accepted and has been streamlined so much over time that it is almost impossible to imagine following the previous workflow today.

Another workflow issue that we faced was both Copy Catalogers and Catalog Librarians had become individually responsible for different types of material. While specialization has its benefits, it was a large contributor to the backlog. For example, when a cataloger was out, that format was set aside until that employee came back. Justification for the lack of cross-training was lack of time and problems with timing. This led to another dilemma: when a cataloger left the organization, we were faced with the decision of whether to wait until we had a replacement hired to catalog that format or reassign it to another cataloger. Training catalogers is a time-intensive process, especially without procedures or a manual. Sometimes while working on eliminating a backlog in one format, we created backlog elsewhere in the workflow. In late 2016, the department lost a Copy Cataloger to attrition and the position was reallocated within the library system. This highlighted the need for change and set the wheels in motion as the department attempted to absorb the workload. Starting in 2018, all catalogers were trained on every format and we have developed a sense of shared responsibility for all formats for everyone by publicly posting shared departmental goals and priorities each week.

Printing Labels

After our ILS migration in 2015, printing labels became a time-consuming challenge. The label print report that Cataloging was given to allow for printing prefixes for spine labels had a coding issue — every prefix (e.g., Mystery, SciFi, YA) that was printed was preceded by a colon; deleting the colons could only be done with a mouse going line by line. Technical Services worked with the vendor to try and resolve the issue for over two years. New management brought the issue to our library director, who asked for a breakdown of the cost to the library for the years the report remained broken.
We calculated that we were spending about 8 seconds on average per item to delete the colons. Multiplied by 45,000 items a year cataloged in-house, we estimated that a total of 222 hours a year (about 1.4 months of FTE) were spent deleting colons, at a cost to the system of over $4,400 over the previous two years based on a $22.00 per hour salary estimate. Our director took this number to the vendor and suggested that they offer us an ongoing discount off the price of our ILS. Within a month, the report was updated and working correctly. Beyond the time required for clean-up, the colon had represented a bigger issue for staff morale — Cataloging staff prioritized working on materials that did not include prefixes or found time-intensive workarounds to printing labels, all to avoid having to delete the colons.

**Documentation**

The Cataloging department also lacked a manual. Over the years, catalogers relied on precedent and institutional memory to handle items outside the norm. While checking for precedent can be effective, it is inefficient because records get deleted over time, everyone may not remember to check the catalog, and there can be conflicting information in the catalog if different catalogers handled situations differently over the years.

As a result, we decided to create a Cataloging manual. The entire Cataloging team began meeting regularly and brainstorming ideas. Everyone took on a role — writing, editing, reviewing, and testing procedures. It took us less than a year from start to finish to go-live and has been very beneficial. We decided on an electronic format which allows it to be easily shared and updated to accommodate new formats and ideas. We have seen greater consistency in our records, easier onboarding for new employees, and increased employee knowledge. When receiving questions from other departments or vendors, it is easier to provide policies and procedures with uniformity and certainty.

**Partial Processing**

Early in the spring of 2017, over 6,000 unprocessed picture books were ordered in just one month — a hugely dispiriting mistake, as almost every item would require a dustjacket as well as specialized processing. As is often the case of mistakes, this set us off on a journey of figuring out how to stop thinking of outsourcing as an all-or-nothing option.

**HCPL** had several existing accounts with our primary book vendor set up with partially processed specifications, which in our case is defined as 2 barcodes with tape, property stamp, branch code label with tape, and a dustjacket if necessary. These accounts had been inactive since 2015, but in June 2017 we started using them again, slowly at first, ramping up over time. This gave the department another way to receive material to catalog and process in-house — a way that required significantly less staff time.

**Macro**

At **HCPL**, all catalogers are responsible for adding item records in addition to bibliographic records to the catalog. Catalogers would catalog in **OCLC** Connexion, import the records into the local ILS, and then create item records one-by-one in a very click-intensive process. We leveraged **Cecilia**’s previous experience with writing **OCLC** Connexion macros to automate batch creation of detailed item records via 949 fields based on criteria selected in a dialogue box. The **HCPL** Add Items macro creates an initial item based on selected criteria and the user has the option of adding additional items to the record, only changing the branch location information and the barcode. These item record details, many of which could only be coded manually before, save between three to eight minutes per title just in adding items to the catalog.
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against the grain / december 2019 - january 2020

ordering partially processed materials was not about eliminating full-
processed, but we were short staffed for a quarter of the year.

low of four days in 2018 with only four staff members; so far in 2019
out to the branches fully cataloged and processed. We hit an all-time
five staff members from receiving an item in our building to sending it
turnaround time significantly: In 2016 it took us on average 24 days with
worth of work from 2.5 staff members.

saving over 5,625 FTE hours, which is the equivalent of an entire year's
by the end of the year we will have cataloged 90,000 items in-house,
an entire year's worth of work from 1.6 staff members. We project that
in a savings of $51,000 in the first year, $95,000 in the second year, and
$88,000 as of July 2019, for a total savings of $234,000. Each year we
have been able to use that money to refresh Cataloging and Processing
technology or reallocate it to the Materials budget. Our customers
benefit by receiving more materials, faster.

extra services

After reducing our turnaround time for delivering new books to the
branches, we were able to take on other projects based on staff feedback
and rebuild trust that had eroded over the previous few years. One ex-
tremely popular customer and staff request involved cataloging juvenile
series with multiple authors under a series title instead of under each
author. Cataloging worked with Collection Development to create a list
of juvenile series written by multiple authors that could be cuttered
by a series title in order to collocate the items. We have pulled items
in these series in for updating over the last year to make the shelf list
consistent. This was a huge customer service win that saved branch staff
time and energy spent identifying and shelving these items contrary to
the information in the catalog and the spine label. Our younger readers
find it easier to discover titles from large, popular series.

Cataloging also outsourced world language cataloging for many
years. This practice led to very slow turnaround times for world language
materials with only marginally useful MARC records. As the macro and
partial processing changes decreased the time spent on individual items,
catalogers were able to take on additional training and responsibility in
finding and creating high quality records for our world language material
without increasing staffing. This has significantly improved our service
to our non-English speaking communities by providing more accurate
cataloging of materials delivered within weeks of ordering instead of
months. Cataloging staff have also indicated that they appreciate ex-
panding their skill set while being more engaged in diversity initiatives.

The ability to make customer service-oriented changes helped change
the system perception of Cataloging and Processing. We are no longer
remote and off-limits; we actively participate with others throughout
the system and invite new ideas to help us better serve our customers.

recommendations

flexibility — One of the goals we hope to achieve through this
paper is to replace the idea of “change” with “improvement.” The
word “change” alone can be a scary concept but, presented in the right
manner, staff can begin to see that change is necessary in order to make
improvements. While we may not always agree with
every change that is made, it is important to have
a positive attitude and be flexible. Be transparent about
the process improvement. Some ideas do not work out
as expected and there will be mistakes along the way.
Leaders should be clear and honest about their own
mistakes while implementing new workflows. Ac-
knowledging our mistakes along the way encouraged
staff to be forthright about their own mistakes and built
trust among the team during times of high change.

We have been transparent about the backlog we
had and how we changed our workflow to improve.
We actively market the customizations we made to our
cataloging policy that respond to customer and staff
needs. Our policy is not just to respond positively to
requests, but to actively solicit feedback and build
relationships outside of Cataloging and Processing
in order to build trust.

communication — Managers: Your employees
are the ones actively doing the work that you have
implemented, so they will be able to provide the best feedback about
whether something is or is not working, enabling you to adjust workflows
continued on page 37

streamlining workflows: combining in-house ...

from page 34

july 2019 — reorganized layout and added additional options

sample oclc field:

every subfield can be manually edited, if desired.

results

the change to working with partially processed books as well as
using the macro resulted in an average time savings of 3.75 minutes
per item. Over the course of just the first year, we saved over 1,651
full time employee (fte) hours, or about 9.5 months fte. During
the second year we saved over 3,357 fte hours, or the equivalent of
an entire year’s worth of work from 1.6 staff members. We project that
by the end of the year we will have cataloged 90,000 items in-house,
saving over 5,625 fte hours, which is the equivalent of an entire year’s
worth of work from 2.5 staff members.

as we have increased efficiency, we have been able to reduce our
turnaround time significantly: in 2016 it took us on average 24 days with
five staff members from receiving an item in our building to sending it
out to the branches fully cataloged and processed. We hit an all-time
low of four days in 2018 with only four staff members; so far in 2019
the average has been five days to send out items fully cataloged and
processed, but we were short staffed for a quarter of the year.

it is important for us to note that the time savings of our switch to
ordering partially processed materials was not about eliminating full-
time positions; it was done in recognition that the workload was more

<http://www.against-the-grain.com>
Streamlining Workflows: Combining In-House ...
from page 36

as necessary. Create a space for employees to voice their concerns. This can be done via group meetings, regular one on one check-ins, or in casual conversation. Also, when implementing a new policy or procedure, follow up with your staff to see if the new procedure is working well. Document your steps and progress along the way. Sometimes the smallest changes can have a much bigger meaning to staff than to managers.

Staff: Ask questions and provide feedback. Not everything that you suggest to your manager may be acted upon immediately, but it may spark ideas for long-term or other improvements. Be willing to give a new workflow or procedure a try to see how it goes. Also, be patient with your managers as they test out new workflows and look for ways to make improvements.

Closing

There is no single tool or solution outlined in this paper that could have solved our issues alone. Our overall increased productivity is the result of many changes working together — as proud as we are of the macro and the savings we have achieved, we are equally proud of the ways we have responded to suggested changes from members of the Cataloging and Processing team and from the Library staff as a whole. Outsourcing continues to be an integral part of our workflow, but we have found that it is important to regularly evaluate what specific tasks are currently available for outsourcing and their effectiveness in our workflow. We made a conscious effort over the last two years to reframe our relationship with outsourcing so that we may provide better customer service and so that our staff feel less vulnerable and more confident of the value they bring to the system. The additional services we have been able to offer in cataloging and processing allow us to highlight in-house talent and skills. Outsourcing felt like a threat for many years, but now it is a tool to facilitate quick delivery of customized cataloged and processed materials — we can allow vendors to handle highly repetitive tasks so we can turn our attention to in-depth customizations, services, and projects that benefit our local community.

Resources and References

2. OCLC Online Computer Library Center. OCLC Connexion Client Guides: Basics: Use Macros. https://files.mtstatic.com/site_10606/5138/0?Expires=1572016244&Signature=QO-xW5wUvh3s3rJYyHpcFmhH5U1EG-0Ti9hX-Q5V1rAFRVOSSqranO2zmUGRLJkvvF9qFvDcUPhD- C4hLMclyxqE-9oyeI7K77thE3YTcEkk8VJd4Gg-7tF-ZZLiDkK9actm93ZkQnMAjYvDe1a7p9g-Sly7zBuOl-vjkw_&Key-Pair-Id=APKAJSY6A4VG17A55ANA

A Peek Inside Vendor/Library Partnership ...
from page 41

Endnotes

2. Libraries seeking more information about other levels should connect with their GOBI representatives for more information; The LTS may also help the library with setting-up their ILS system to work with GOBI, for example, helping with Embedded Order Data (EOD) load tables, best practice information on how to set-up the Electronic Data Interchange (EDI) vendor profile for GOBI, and optimizing the library’s GOBI-Alma workflow timing.
3. An example error would include issues with matching cases on fund codes or fund codes without properly allotted funds in a library’s Alma system.
4. The GobiExport workflow was originally developed for Innovative Interfaces, Inc. customers who were not able to use a vendor order number as a match point.
7. Libraries would need to set-up a bypass subaccount with GOBI prior to utilizing this functionality.
8. Fullerton manages GOBI purchased eBooks locally instead of in the CZ.

Rumors
from page 29

publishers and their interactees, primarily on matters relating to digital change or the supply chain. I enjoy reading his blog which I don’t do enough! Check out one of the latest — 2020: Zero year thoughts about the changes in book publishing — https://www.ideallog.com/blog/.

Audible has finally settled the lawsuit over its speech-to-text feature, Captions. In July, Audible announced Captions, claiming it will be geared toward students as an educational text accompaniment to its audiobooks. Publishers were immediately up in arms, declaring it a copyright issue, arguing that Audible only had licenses for audio-use, not text. While Audible insisted that its service was not a replacement for eBooks, publishers took the issue to court, where it has been stewing since August. The Guardian reports that “the parties had resolved their disputes and expected to submit the settlement documents by 21 January.”

https://www.theguardian.com/books/2020/jun/15/audible-settles-copy-right-lawsuit-publishers-captions

Speaking of Audible, I have been riveted by listening to The House of Morgan: An American Banking Dynasty and the Rise of Modern Finance by Ron Chernow. This is from Amazon and is very accurate in my opinion: “Published to critical acclaim twenty years ago, and now considered a classic, The House of Morgan is the most ambitious history ever written about American finance. It is a rich, panoramic story of...”

continued on page 52
A Peek Inside Vendor/Library Partnership to Establish a Firm Order Workflow Through a Consortial Migration

by Moon Kim (Acquisitions Librarian, formerly at California State University, Fullerton; currently at Ohio State University) <kim.7716@osu.edu>
and Moriah Guy (New Business Development Manager in Library Technical Services, GOBI) <moriahguy@ebsco.com>

Introduction

The California State University (CSU) system is one of the largest public higher education systems in the United States and includes 23 institutions, largely comprehensive universities, across the state. Within this state system, the CSU libraries have been cooperating on collections building and have shared technology services through the Chancellor’s Office (CO). In June 2015, the contract was signed for CSU libraries and the CO’s libraries supporting the division to migrate to Ex Libris’ Alma and Primo as part of the Unified Library Management System (ULMS), where some of the principles in moving toward a shared integrated library system (ILS) and discovery environment were to increase collaboration and share cost savings.

The CSU libraries went live with Alma and Primo in the summer of 2017. For those working in technical services, the possibilities to centrally manage consortially licensed resources as well as share bibliographic records in Alma’s Network Zone (NZ) at the consortial layer meant new opportunities to collaborate across the libraries and new ways to re-think workflows. The migration and subsequent implementation of an unfamiliar ILS intimated that it was going to be necessary to come up with consortial policies and best practices within the CSU libraries, but also required close partnerships with vendors to establish workflows and integrate systems to gain efficiencies. The special issue on “Vendor Library Partnerships” in Against the Grain highlights the importance of this symbiotic relationship and stresses the common “vision” vendors and libraries share to “provide access to the world’s information in order to create new knowledge.” 1 The CSU consortial migration proved that collaboration within the consortium as well as with vendors is a necessary requirement to execute this vision.

GOBI Library Solutions from EBSCO (GOBI) operates through a territory system where Library Technical Services (LTS) representatives work with libraries on various technical service projects such as migrations, opening day collections, workflow automation, shelf-ready services, and any needed training sessions to support service set-ups. Having one individual working throughout the region on all institutional projects helps provide best practice information to current customers and allows for multi-campus projects to have a common representative working with individual institutions on a variety of levels for consortial integration.

As different vendors offer different degrees of support and feedback mechanisms to understand a library’s individual structure, having a regionally appointed representative with the understanding of multiple libraries can lead to better understanding of library technical service trends, best practices, and needs. For example, although most libraries have unique set-ups, there will often be other institutions with similar needs, and vendors can be a source of information to other library contacts for best practices, or new ideas. A customer who has completed implementation and has been using a service for some time may have advice for libraries looking to set-up a similar service. A regionally placed vendor representative willing to assist with cross library communication can, with permission, provide contact details or responses to the libraries that are working on service implementations.

Libraries and vendors collaborate on technical services automation and migration projects. CSU Fullerton, as part of the larger ULMS consortial migration, worked closely with the regional GOBI LTS to implement a workflow that avoided duplicating record fees in the new environment where bibliographic records are shared consortially. System migration projects are time and labor intensive, and, depending on the scale of the project, setting-up the vendor profiles and system testing can take months to coordinate. It is critical to get in contact with vendor representatives well in advance of the migration in order to have a smooth transition, discuss timelines, and form best practices. It is also equally important to maintain those communication channels during and after the migration to troubleshoot any issues as they arise.

Choosing a Firm Ordering Workflow

Locally at Fullerton, there was very little integration connecting the former ILS, Millennium, to other vendor systems, nor to the CSU-wide financial system, PeopleSoft, in the acquisitions work area prior to the migration. Thus, there was a lot of duplicative work being done to align acquisitions information in various systems in the form of data entry. The migration was viewed and utilized as an opportunity to update legacy practices and take advantage of the functionalities offered in a new ILS to streamline both local and consortial acquisitions workflows. GOBI is the main vendor supplying materials in the English language or published in predominantly English-speaking countries to Fullerton. GOBI supplies one-time and standing order titles to Fullerton via the approval plan, firm orders, DDA, and ongoing standing orders. Fullerton uses GOBI’s shelf-ready services and works with OCLC to get full bibliographic records for the approval and firm order titles ordered through GOBI. Most of the GOBI orders supported local collections building efforts. For the purposes of this discussion, the focus will be on optimizing the use of the LTS and the available GOBI options to establish a firm ordering workflow.

GOBI customers with Alma as their ILS have three available firm order workflow options to choose from. During the migration process, a library would work with a GOBI LTS representative to learn more about the available workflow options, select a workflow, and have the workflow implemented in their Alma environment. This process can take several months depending on the length of time the library needs to select a workflow and the complexities of a library’s account structure within GOBI. The three available firm order workflow options are GOBI API, GOBIExport, and Electronic Order Confirmation Records (EOCR). It is important to note that each workflow option is part of GOBI’s library technical services, and both the GOBIExport and the EOCR workflows have “Plus” and “Basic” versions. The GOBI API currently has only one version most analogous to the “Basic” version in terms of the bibliographic data provided. For the sake of simplicity, this article will focus solely on the “Basic” level workflows for Alma libraries. 2 All the bibliographic information in the “Basic” level records for all three firm ordering options are capitalized and are easy to visually identify in the system.

The GOBI API firm ordering entails the library placing an order directly in GOBI and through the API set-up, a brief bibliographic record that includes order details is provided to a library’s Alma system (Institution Zone (IZ) vs. NZ is based on a library’s Alma system settings). Through the transfer of information, GOBI obtains Alma’s purchase order line (POL) number for each title in an order, allowing for the POL to be a match point for any downstream services such as cataloging or Electronic Data Interchange For Administration, Commerce and Transport (EDIFACT) invoicing. With the API, the library does not need to connect to GOBI’s FTP server to obtain the brief bibliographic records. Of note, the brief records are not MARC formatted nor are they available for easy access to the library as the API is a traditional mechanism to automatically feed metadata into a library’s Alma system. Specifically, the API build specifies what GOBI information is placed in each corresponding section of Alma. The resulting file is a X12 file generated for the server to read. These files are only accessible by a developer on the GOBI server. Files with continued on page 40
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Straight-Forward License
Easy IP-Link
Discovery Service Friendly
High Quality MARC Records
Local Hosting Option
Unlimited Printing
Subject & Annual Collections
Counter Compliant Statistics
Excellent Customer Service
The GobiExport firm ordering workflow operates as follows: the library places titles into an “export” cart online in GOBI’s interface and batch exports MARC files with bibliographic information and the Embedded Order Data (EOD) either through GOBI’s FTP site or through GOBI’s FTP site. The export files are usually available within five minutes of initiating the export and the library would then load the files into Alma using an import profile that loads the EOD files, generating POLs for individual titles and item records for print materials. The import profile(s) would set needed default values and/or map pertinent values to the local data indices, and either immediately or on a scheduled job, the library’s ILS would “package” the POLs and send back EDIFACT orders to GOBI on specified subaccounts. The packaged orders would contain various information from the export records and Alma about each ordered title.

The EOCR firm order method involves: the library placing orders directly in GOBI and a brief bibliographic record is provided to the library through FTP the next business day after a library places the order. The library then uses an EOD load in Alma to pull in the brief records from GOBI’s FTP server. The EOCR records are MARC formatted records that have the bibliographic information and contain the order detail information the library provided at point of order. The EOCR workflow uses the vendor order number also known as the GOBI order key as a match point for downstream services.

The ULMS migration at Fullerton necessitated a thorough understanding of all the available options with the help of the GOBI LTS. Each one of these workflows have different set-ups with GOBI and Alma, allowing for institutions with very different needs to have a variety of options to choose from. But each chosen workflow has implications on subsequent workflows, especially because acquisitions is one of the first steps whereby records get created and/or loaded into the ILS.

Prior to the migration Fullerton subscribed to GOBI’s EOCR service but this workflow required an added order acknowledgement data transmission process in a Millennium environment. Therefore, the EOCR service for Alma was quite different. During the migration planning stages, Fullerton opted to utilize the GobiExport service with the recognition that the bibliographic records will be shared at the consortial level and governed under the consortial bibliographic management policies as well as begin the EDIFACT electronic invoicing to improve the invoicing workflow. Neither of these two services were previously implemented at Fullerton.

Within the CSU libraries, there is a varied landscape on the GOBI ordering workflows across individual campuses and there were a few institutions that went live directly with the GobiAPI service in the summer of 2017, which aligned with the CSU consortial Alma go-live date. Fullerton opted for a more conservative approach for establishing firm ordering procedures. After reviewing all the options, in consultation with the GOBI LTS and other colleagues utilizing Alma and GOBI, Fullerton implemented the GobiExport option in order to have more direct control over the timing of when the brief order files will be ready, better manage the orders before they are sent out from the system, and still be able to batch ingest records by exporting EOD bibliographic files from GOBI and loading them into Alma.

Discussions

All Alma users will have an IZ and have access to the Community Zone (CZ). Local information, records, and inventory will live in the IZ while the CZ is a knowledge base for electronic resources, can serve as a catalog, and stores community authority records. Consortial Alma users will have the added benefit of utilizing the NZ, which hosts shared bibliographic records and facilitates the central management of consortially licensed electronic resources. The CSUs initially populated the NZ based on gathering the attached holdings information of every CSU library in OCLC. There is currently a daily OCLC feed that continuously refreshes the NZ with any adds, updates, and deletes of CSU libraries holdings in OCLC to maintain currency of bibliographic data.

In this shared bibliographic space comprised of universities with similar missions and somewhat overlapping purchasing patterns based on the collections review in GreenGlass, the Acquisitions Librarian prior to the migration envisioned scenarios where two or more institutions would initiate orders for the exact same resource that would utilize the same bibliographic record in the NZ. The consortial migration already necessitated a close communication with the GOBI LTS since the majority of Fullerton’s firm order purchases were transacted through GOBI, but Fullerton also wanted to put in place a workflow whereby it would be possible to avoid purchasing the same bibliographic record that others have already purchased within the consortium.

The main CSU system’s funding comes from the public; more than half of CSU’s revenue is from the state of California through its taxpayer revenue is from the state of California through its taxpayer continued on page 41
contributions and a major portion of the remaining funding is through the collection of tuition fees. The distribution of state funds initially trickles out through the CO, which then filters to the individual campuses, and continues to subdivide to the various colleges and administrative units. It is the responsibility of acquisitions professionals to “strive to ensure good stewardship and maximum value of the institution’s resources” according to ALA ALCTS’s “Statement on Principles and Standards of Acquisitions Practice.” Since most of the CSU libraries’ collections and/or operations budgets ultimately come from the same source, as a steward of public funds, the original thought process behind implementing GobiExport at Fullerton was to design an ethically-minded financial workflow where public funds were not expended for the exact same product more than once, if possible.

Fullerton contracts with OCLC’s WorldShare Collection Manager (WCM) service through GOBI for full bibliographic records of titles purchased via GOBI’s approval and firm orders. It is possible to create bypass subaccounts with GOBI for firm orders so that resources purchased under this type of an account would not result in an automatic purchase of a full bibliographic record. Purchases made under the bypass subaccounts would however also result in no physical processing, so Fullerton essentially forfeited shelf-ready services for a portion of their firm orders in favor of attempting to ethically steward public funds.

In addition to the GobiExport firm ordering workflow outlined in the previous section, at a more granular level, Fullerton’s acquisitions record import workflow includes the manual review of bibliographic records if there is a match in the NZ. Alma has matching algorithms built into the import profiles predominantly based on bibliographic records matching on MARC fields 02X and 035. When the GobiExport files with EOD bibliographic records are loaded, if there are no matches in the system, then the EOD bibliographic records would load to the NZ and create the POLs and item records in the IZ. But if the loads included matches, an acquisitions staff would utilize the full bibliographic record already in the NZ and flip the subaccount to a bypass subaccount in the POL, which would avoid triggering a purchase of a full bibliographic record through WCM.

Fullerton’s fiscal year runs from July 1st to June 30th and, over the span of the two fiscal years 2017/2018 and 2018/2019, there was a total of 2,537 firm orders placed with GOBI, 624 electronic and 1,913 print. Out of the 2,537 GOBI firm orders, 600 firm orders total were placed on bypass subaccounts, 16 electronic and 584 print, meaning nearly 25% of firm orders were ordered without full bibliographic records or shelf-ready physical processing in two fiscal years. This process allowed for the customer to select and use certain subaccounts for different purposes, ultimately putting the control on technical services outsourcing usage on the library.

Upsides

Having a single vendor representative that was knowledgeable about workflows across the entire consortium was helpful in getting a sense of the diversity of workflows. From the financial perspective, there were cost savings as Fullerton avoided purchasing bibliographic records that had already been purchased by another member of the consortium. There was also an informal assessment of the cost to physically process the materials in-house with student labor. At optimal production with varying degrees of complexity in physically processing where the students were paid at minimum $12.00 per hour in 2019, it took the students one to three minutes to apply security device, apply two stamp impressions, apply barcode, scan barcode into the ILS, then generate and apply the spine label. Having in-house physical processing of materials was significantly cheaper than outsourcing that activity to a vendor. The physical processing factor obviously does not apply to electronic materials but Fullerton is an e-preferred campus so the benefits derived from using existing bibliographic records in the NZ for e-books might be better realized in the future as there are increased purchases of e-formats on the bypass subaccounts. From an ethically principled stance, if funds were allocated to state institutions in a shared environment, at least for firm orders, Fullerton avoided paying for the same exact product if another CSU library had already spent funds on the record itself or devoted staff time to cataloging or copy-cataloging activities.

The GobiExport and EDIFACT ordering workflow provides CSU Fullerton with more complete control over the ordering workflow by allowing for brief bibliographic records to be uploaded to the ILS before orders for resources are placed. This amount of micro-managing of orders can be a successful cost savings option for libraries wanting a mixture of outsourced shelf-ready services with the flexibility to completely bypass outsourcing. Fullerton’s GobiExport service along with the GOBI firm orders import profiles set-up by the Acquisitions Librarian ensured that in situations where there is already an acceptable full bibliographic record in the NZ that adhered to local cataloging standards, the records were utilized. From a purely financial perspective, the quotes for the EOOCR and GobiExport services at the “Basic” level were comparable while the GobiAPI service was quoted at a higher rate than the other two, even with the CSU consortial deal for the GobiAPI. Furthermore, the implementation of GobiExport cut down the lag time in loading the EOD records from one day to immediately when switching from the EOOCR service to GobiExport, significantly improving the discoverability of newly purchased items right away.

Downsides

GobiExport and EDIFACT ordering workflow is more time and labor intensive for the library because it requires more steps to order a title than GobiAPI and it does not fully utilize the automation technology Alma and GOBI are capable of. Although nearly 25% of firm orders were ordered on bypass accounts over the span of two fiscal years, the WCM fees charged were modest and the workflow was not the most efficient way to acquire materials using Alma. The ordering work at Fullerton is done by Library Services Specialist IIIs, who typically “perform more complex or specialized [...] library duties to support daily library operations and/or programs,” and therefore are compensated for their labor at a rate higher than entry level employees. Due to the layered workflow for GOBI firm ordering, it required staff with more experience to handle the work but could introduce more human errors. The ordering workflow could be optimized if the ethical stance could be overlooked, especially since specialized labor costs far outpace the cost savings from purchasing bibliographic records.

Conclusion

This is one of the many conversations taking place across libraries, vendors, and consortia. More work needs to be done to fully understand the optimized or non-optimal workflow trade-offs and re-imagine how it could be enhanced in the future. Having a 360 conversation with vendors and librarians working at various ends of consortial work is one way to start the assessment. Through a close partnership with the GOBI LTS representative, Fullerton was able to implement a system that bypassed duplicate purchasing of bibliographic records. But for those interested in simulating a similar workflow, it would be recommended to look at the costs and efficiencies as they pertain to the cost of services, cost for labor, cost savings, steps involved, and the time it takes to perform the full GobiExport firm ordering cycle, while balancing the ethical conundrum of managing public funds. It would also be interesting to find a more efficient solution that could scale consortially.

The overall workflow resulted in a GobiExport option at Fullerton that allowed the flexibility to utilize the bypass subaccount structures whereas consortially some sister campuses preferred the GobiAPI. Through close partnership with GOBI’s LTS representative, the project to update institutional technical specifications had a common representative working with individual institutions on a variety of levels for consortial integration and for Fullerton to be able to enact a system that bypassed duplicate purchasing of bibliographic records, which was the desired outcome. Although it is not yet certain if the benefits fully outweigh the downsides, the migration not only resulted in consortial collaboration across the libraries and the CO employees but formed a close alliance with vendors to flesh out the workflows behind the scenes and re-visit existing infrastructures with a new lens framed by the ILS.

endnotes on page 37
The Open Ed conference, after a 16-year run that saw growth familiar to long-run attendees of the Charleston Conference, is cancelled. Conference founder, David Wiley, made clear in his blog that the flash points and fractures among key constituencies was the reason, not demand, not financial viability and most definitely not need. In a largely measured blog post, Wiley avoided calling out any specific interest group, but for four telling words, which I hold in the following quote from the blog post: “Are you primarily focused on reducing costs for students? Improving student success? Increasing pedagogical flexibility for faculty? Bringing retribution to publishers?” Bringing retribution to publishers … In my role at ProQuest I sit in a privileged position between publishers and library patrons, seeking to add value, remunerative value, through curation, aggregation, platform tools, services and risk taking on new content types and services. In a prior life I ran a book publishing company and I also served as a teaching assistant at the University of Arizona. The idea that a key constituency in the open education movement would have as its driving motivation “…bringing retribution to publishers…” is concerning. Or, rather, that the founder of the Open Ed conference believes this is a driving motivation for many attendees of the conference merits unpacking.

I spent many years with Pearson Education, serving as an acquisition editor and ultimately as an editor-in-chief. I participated in revision review meetings, price increase discussions, strategy sessions to discuss “bundling” (the packaging together of a book and access code to a website thus creating a unique ISBN) and many other meetings to steer the business of the publisher. I watched as prices rose and revision cycles increased. At the same time, however, I also participated in uncountable user and faculty research sessions, focus groups and product planning sessions which have as their result huge investments in learning technology and online content delivery. These investments have contributed to the massive growth of online learning facilitated by digital textbooks, learning management systems and adaptive platforms fully informed by the cutting edge of learning science. There is little doubt that decisions were made solely to increase revenue or profits, but this was never done apart from making very large investments in technology and platform. These investments yielded tools like MyLab for math, which has helped hundreds of thousands of students learn math with an efficiency impossible before technology delivered a solution and saved thousands of teachers time in grading, allowing more time invested with students. The central point I am moving toward with this example from my time at Pearson is that it is too simplistic a characterization to label publishers as a source of a problem in higher education — rising material costs — deserving solely of retribution. Moving to a respective corner in a debate amongst a constellation of views, ideas and perspectives and then claiming those with an alternative position are wrong, or bad, or worthy of retribution, is a hallmark of our social and political climate, but not something I would expect to invade the spaces where publishers, teachers, researchers, aggregators, etc. meet.

The primary product I manage is a large aggregation of educational video, Academic Video Online. I have long-stated that Academic Video Online must be the single best site for educators and learners seeking the very best of “for fee” and “for free” educational video. The growth in supply of freely available educational video has been significant. Khan Academy, TED Talks, Brain Pop, etc. Alongside these excellent free resources, there is educational documentary content from Media Education Foundation, nursing skills video from Medcom, feature film from Sony Picture Classics and more. I give over a good portion of each working week to the consideration of business models and access models that will accelerate academic video online’s entry into more universities and community colleges, and I can see no future scenario where the content from most of our providers is freely available. Add to this the significant investment required in research and development to build and improve an academic video platform, let alone sustain the platform and the daily ingestion of content, and the thought that there could be a 100% freely open educational video product is rendered untenable. Of course, know the argument I am making is not unique and that the mechanisms of alternative funding for open educational content are in their infancy, but how well will we collectively serve faculty and learners if we move to opposite corners of the ring, lift our gloves and begin battering? The demise of the Open Ed conference strikes me as not unlike the demise of the political discourse in the United States, and beyond … Those who cling fervently to their position — left or right — “for free” or “for fee” — do so with relative disregard for the 40% or so in the space between who simply want to get the job done. One of my time-worn and tested axioms is that students are looking for the shortest and least expensive line between the first day of class and whatever grade they define as acceptable. Also, faculty are looking for the shortest line between the first day of class and the student course reviews they define as acceptable. The OER purist’s argument that all coursework and content must be free does not satisfy the basic requirement of students and faculty. And the advocates of profit-directed publishing companies who operate solely to improve the top line and bottom-line miss the mark as well in terms of the needs of students and faculty.

The Charleston Conference is not without its moments where librarians question the intentions of publishers and service providers. But we come together, year after year, and hear one another and, in doing so, we modify our understanding of one another’s place in solving important problems in discovery and research. Librarians give valuable input into what is needed from industry providers to support researchers and learners, and industry players gain insight into how we must continually evolve our products and our business models. What is better? Separate corners with fists up? Or a marketplace of ideas fiercely defended but respectfully considered? I attended Open Ed for the first, and last, time in 2018. I felt and heard the tension between those advocating for open educational resources (OER) to develop apart from influence by publishers and for-profits companies. I also heard language, from both public OER activists and for-profit and non-profit publishers about the importance or reducing cost to students. The end of the Open Ed conference is an opportunity lost and those in the middle of the issue will be less well-served as a result.
Column Editor’s Note: We are carrying forward our new model for the Reader’s Roundup to include books that are focused on librarianship (broadly speaking) and reference works (formerly in the Reference Reviews section). As your humble editor, I am feeling a bit more confident that we are hitting our stride (so to speak) and will be able to share reviews in each issue. Our goal is to have a review column in each of the six Against the Grain issues that come out each year.

If you would like to be a reviewer for Against the Grain, please write me at <cseeman@umich.edu>. If you are a publisher and have a book you would like to see reviewed in a future column, please also write me directly.

Thanks to my great reviewers for getting items for this issue’s column. I have three new reviewers included in the mix — Presley Dyer, Christopher Edwards and Halley Todd. I am happy to have also reviewed from my repeat contributors — Jennifer Matthews, Katherine Swart (with two reviews), Steven W. Sowards (also with two reviews) and my colleague Sally Ziph.

Here is the ATG Reviewer Rating that will be used for each book covered in the Reader’s Roundup. This reviewing scale reflects our collaborative collections and resource sharing means. I think it helps classify the importance of these books.

- I need this book on my nightstand. (This book is so good, that I want a copy close at hand when I am in bed.)
- I need this on my desk. (This book is so valuable, that I want my own copy at my desk that I will share with no one.)
- I need this in my library. (I want to be able to get up from my desk and grab this book off the shelf, if it’s not checked out.)
- I need this available somewhere in my shared network. (I probably do not need this book, but it would be nice to get it with three to five days via my network catalog.)
- I’ll use my money elsewhere. (Just not sure this is a useful book for my library or my network.)

Happy reading and be nutty! — CS


Reviewed by Christopher Edwards (Assistant Head of Information Literacy, Eugene McDermott Library, University of Texas at Dallas, Richardson) <chris.edwards@uta.edu>

Technology represents an ever-present challenge for librarians as we continually find ourselves and our collections astride the divide between new tech and traditional media. This is particularly true in the public sector, where libraries need to stay relevant in the eyes of users, manage funds responsibly, and avoid gimmicky fads that won’t stand the test of time.

Erin Berman provides a useful guide to incorporating technology and outreach into library programs in a thoughtful and user-centered way. Berman is the Principle Librarian of the Learning Group at Alameda County Library in California with a history of leading innovation and technology literacy. For librarians handling programming for the first time or wanting to refresh existing programs, this is a useful step by step guide to make this process easier. Berman starts out with tips on identifying technology barriers and needs in their communities and forging partnerships that support new initiatives. This is where the “adventure” begins. To be truthful, this approach feels most appropriate for the inexperienced programming librarians, or those really starting from zero. Readers whose libraries have already established partnerships and outreach initiatives may find this part of the book a little basic (but they should stick around as there’s still some really good content for breaking out of a rut).

The bulk of the book is devoted to explaining “design thinking.” This process can help people find creative ideas by looking at problems through a fresh approach. There is a nicely detailed explanation of how to open up to new ideas and the dreaded “we’ve always done it this way” traps. If you haven’t had the opportunity to work through a live design thinking training session, this is the next best thing. This part of the book could be used as a workbook for really any new program initiatives, not just technology promotions. It’s necessary to point out here that no two situations are the same and there are no one-size-fits-most solutions. Implementing this approach requires each librarian to adapt new ideas to their own circumstances. The design thinking chapters assist in this endeavor.

Finally, there are case examples that explain how other libraries have used design thinking and technology outreach techniques to assess their interaction with the communities they serve. Berman also does a good job of analyzing what worked and what didn’t. Each study walks the readers through the experience from inception to fruition. Iterations of problem-solving discussions, challenges, and outcomes show how professionals were able to integrate the new programs into their workflows and assess their success. Inset callouts among these anecdotes help the reader to pick up additional tips.

This experience is evidence in the simple and instructive design of this book which could serve as a training manual for upcoming professionals. Overall, I consider this a fine book and one that I would return to as a leadership tool for future projects in my own library.

ATG Reviewer Rating: I need this in my library. (I want to be able to get up from my desk and grab this book off the shelf, if it’s not checked out.)


Reviewed by Jennifer Matthews (Collection Strategy Librarian, Rowan University) <mathewsj@rowan.edu>

Collection development covers a wide array of areas from acquisitions, management of different formats, evaluation and assessing collections, and the maintenance and preservation of materials. Very often textbooks in this area tend to split their focus into sections on print versus electronic. This book, however, does not take that approach and instead looks at print and electronic simultaneously under the larger headings that universally apply to collection development and management.

Vicki L. Gregory is a professor at the School of Information Science at the University of South Florida and teaches collection development, digital libraries and library administration. She has written several books and numerous articles both nationally and internationally. As part of this textbook, Gregory has included an appendix of publishers, wholesalers, and vendors that would be a handy reference for the graduate student or even the experienced collection development manager. Throughout the work, Gregory provides insight on real-world
practicum that takes this from just an in-the-classroom perfect environment to one of practical application.

While the primary target audience for this work is a graduate student in library and information science programs, this textbook also works well as a refresher for those who have not worked in collection development for a long time or those who may have just had it added to their responsibilities. Topics start with the basics such as what is collection development and move through budgets, copyright, legal issues, preservation, professional ethics and more.

For instance, in chapter eight on cooperative collection development and resource sharing, she paints a potentially rosy picture about how library collections can be enlarged and enhanced by participation in consortia. Gregory even alludes to many librarians’ attempts to recreate the Library of Alexandria over the many years. However, she also mentions that there are disadvantages to consortia such as imbalanced participation from all members placing what could be a disproportionate burden on some participating members.

In each chapter, Gregory, includes some combination of summary, activity, case study, discussion questions, references, and selected readings. The activities are created to incorporate real-life practice such as the budgeting exercise for the acquisitions discussion asking students to find a budget line with no new money and the weeding activity that asks them to visit any library and report decisions. This practical application makes it possible for students to understand how these areas apply once they are working on their library careers. Using these types of examples allows librarians, especially those new to the area of collection management, to see the wide range of possibilities and realize both the challenges, and the opportunities that await them.

Students and experienced librarians coming to collection development for the first time should benefit from this updated work, as would those individuals. The authors mention in the introduction that the book was written specifically for these audiences. Topics start with the basics such as what is collection development and move through budgets, copyright, legal issues, preservation, professional ethics and more.

The hands-on projects are mainly crafts, but a few involve writing or making a graph. I don’t often think of writing as a hands-on activity per se, but I suppose it could be. And graphing would appearFromString here: expression about the railway, but directs all its attention to books of folktales and international landmarks, festivals, and people. Directed at children ages 5-10, each chapter has a theme, such as the Day of the Dead in Mexico, and a picture book loosely related to that theme or the country of origin. Kirker includes a very short summary of the event, landmark, etc., a fun fact (again loosely related), and the titles of a few additional picture books. A description of a hands-on project, such as a craft or writing exercise, comes at the end of each chapter.


Reviewed by Katherine Swart (Collection Development Librarian, Hekman Library, Calvin University) <kswart20@calvin.edu>

With the popularity of STEM programming among elementary-aged children, some librarians might worry that the subjects of history, geography, and art are being de-emphasized as a result. Author Christine Kirker thinks so and has developed a book of projects centered on picture books and the theme of exploring. She is a library associate with the Carroll County (Maryland) Public Library and has written library programming books for ALA Editions since 2009. With 25 Projects for Global Explorers, Kirker focuses her programming on both American and international landmarks, festivals, and people. Aimed at children ages 5-10, each chapter has a theme, such as the Day of the Dead in Mexico, and a picture book loosely related to that theme or the country of origin. Kirker includes a very short summary of the event, landmark, etc., a fun fact (again loosely related), and the titles of a few additional picture books. A description of a hands-on project, such as a craft or writing exercise, comes at the end of each chapter.

25 Projects for Global Explorers shines as a curated list of themed picture books, but that’s about all. It’s hard to get your bearings in this book, and a lot of the connections are left to the librarian to make. Take for example the Day of the Dead chapter. Kirker introduces a picture book about the Day of the Dead. Then, she veers off course to talk about the ancient Mayan city of Chichen Itza and immigration at the Mexico-U.S. border. No transitions or tie-ins are given in order to help the reader piece together a library program from the information. Likewise, the chapter on the Trans-Siberian Railway gives a few sentences about the railway, but directs all its attention to books of folktales and a craft about mittens.

The hands-on projects are mainly crafts, but a few involve writing or making a graph. I don’t often think of writing as a hands-on activity per se, but I suppose it could be. And graphing would appear to fall under STEM, which Kirker claims to be avoiding. The crafts themselves appear to be uneven and not very exciting. Many involve inexpensive paper towel tubes and straws, but then others call for pricey specialty items like glow-in-the-dark spray paint for a lantern.
and succulents for a terrarium. None of the craft projects include diagrams, which is problematic when trying to follow origami instructions or build a model of the Golden Gate Bridge. The Grand Canyon chapter inexplicably suggests children make a “fossil” by imprinting their hand in clay. The Mount Rushmore chapter suggests children carve their own likeness from a block of clay, something I dare say few would have success at.

Kirker says in her introduction that the activities should draw students away from screens, but her appendix lists websites corresponding to each chapter for further exploring. This isn’t all bad, but the international chapters suggest visiting the government website for the affiliated country. How might the government website of Iraq be helpful to a chapter called Ziggurats of Ancient Mesopotamia and incongruously featuring a book about calligraphy?

Ultimately, this book is unsatisfying. Apart from saying in her introduction that STEM and standardized testing are robbing children of their creativity, the author does little to convince the reader that this is actually an issue in schools and libraries. Each chapter hints at an idea for library programming, but leaves all of the research to the librarian. Furthermore, the chapters lack cohesiveness, and the hands-on projects are largely lacking a connection to the subject at hand. The books Kirker suggests are interesting, but I would suggest ALSC’s list of programs for school-aged kids (http://www.ala.org/alsc/kickstart) or a book like *Lessons Inspired by Picture Books for Primary Grades* (ALA Editions, 2019) instead.

**ATG Reviewer Rating:** *I’ll use my money elsewhere.* (Just not sure this is a useful book for my library or my network.)
while Heather Collins (Assistant Director of Research and Learning) is from the University of Kansas Medical Center Dykes Library. They won the 2016 ACRL Instruction Section Innovation Award for their joint work on the NLA.

The true value of this manual is in teaching librarians how to create a solid foundation with collaborators and establishing a shared framework before tackling projects. This manual will help librarians who have little project management experience learn how to plan, implement, test and revise their projects. It also does a nice job of pointing out potential technical issues, and thinking about long-term planning and maintenance, especially with digital content. I also appreciated the advice of how to consider bringing in non-librarian collaborators (such as instructional and graphic designers). I also appreciated that the authors pointed out how important administrative support and buy-in is for these types of projects. It is also important for the members working on the project to consider how to talk and create an elevator pitch for the project to internal and external stakeholders.

The structure of the manual is very well laid out. The purpose and intent of every chapter is clearly spelled out. Each chapter contains important terms and definitions, learning objectives for the chapter, tips and critical questions, checklists, visual figures, and also references. The manual also has an appendix with worksheets readers can use to plan their own projects. There are examples from the creation of the NLA in here, too, so readers can see how the authors utilized these tools. For example, in Chapter 4: “The Design Process,” the authors defined assessments, had Figure 4.7, “NLA Testing Cycle” and then showed how the authors used assessment in Appendix G for their rapid prototyping test reports with students to improve their digital learning objects. In short, each chapter serves as a mini-lesson plan. The authors clearly used instructional design principles to create and plan this manual.

Despite the focus on digital learning objects, the lessons can easily be transferred and used with non-digital projects, such as library instruction handouts provided in face-to-face training sessions. Also even though the main focus is on cross-institutional collaboration, the advice can also easily be transferred to any form of collaboration with a peer. This manual may not be of much value to librarians with extensive project planning experience and those who have worked with many collaborators.

ATG Reviewer Rating: I need this available somewhere in my shared network. (I probably do not need this book, but it would be nice to get it with three to five days via my network catalog.)

Reviewed by Katherine Swart (Collection Development Librarian, Hekman Library, Calvin University) <kswart20@calvin.edu>

The American Association of School Librarians (AASL) developed the new National School Library Standards that were detailed in an ALA Editions book in 2018. Developed “for learners, school librarians, and school libraries,” the standards explore six shared foundations: Inquire, Include, Collaborate, Curate, Explore, and Engage. Under each foundation, the authors of the standards then break down the concept into domains and competencies. It’s quite an elaborate design, and I can understand why a whole book has been written about the new standards. What’s more, school librarians are not only working with the AASL Standards in the profession, but they also need to be aware of state standards such as the Common Core and the objectives of classroom teachers, etc. And while the AASL Standards really are meant to be flexible complements to existing school standards, I imagine that many school librarians would appreciate examples of how to implement the new Shared Foundations in their daily interactions with students. Fortunately for librarians, Lessons Inspired by Picture Books for Primary Grades is a great place to start.

Authors Maureen Schlosser and Rebecca Granatini are a dynamic librarian-teacher duo who have collaborated for years on elementary-level lessons based on picture books. Now retired, Schlosser has continued to write and blog about library lesson planning on various platforms. A teacher and curriculum specialist, Granatini shares her experience with STEAM education (covering Science, Technology, Engineering, the Arts and Mathematics) at conferences. Together they have created 21 lesson units based on current children’s books and meticulously mapped each one to the AASL Standards Framework for Learners, the Next Generation Science Standards, the C3 Framework for Social Studies State Standards, and the Common Core State Standards for English Language Arts/Literacy.

Each chapter centers on a children’s book, its shared foundation, and a big thematic question. For example, the book Me ... Jane by Patrick McDonnell is a story about Jane Goodall as a child. The shared foundation is inquiry and the question is “How Can We Record Our Observations?” Similarly, the book One Plastic Bag: Isatou Ceesay and the Recycling Women of the Gambia falls under the explore shared foundation and asks, “How Can People Find Solutions to Problems in Their Community?” Each chapter has four lessons following the domains think, create, share, and grow. Each lesson has a main objective, tie-in to the AASL Standards Framework for Learners, and detailed instructions for how to lead students in activities. Some lessons involve creating anchor charts and filling out pre-made worksheets, both of which are provided in the book. Other lessons involve creating art, music, and movements. Still more lessons involve ways students can share what they learned and demonstrate how they have grown in their understanding.

I like a lot of things about this book. First, the selection of children’s books is current and represents diverse characters, fiction and nonfiction, and a variety of topics. Each map well to the shared foundations, promoting inclusion, exploration, and collaboration. Second, the book is comprehensive. Lessons include objectives, duration, materials, and worksheets. Appendices include additional assessment sheets, wonderfully detailed rubrics, and lists of vetted online resources. Lastly, as I already mentioned, the introduction maps every chapter to the AASL Standards, as well as three additional sets of school standards. This makes it easy for librarians to track what standards they’ve covered and share that progress with administrators.

Readers will need familiarity with AASL’s National School Library Standards in order to get the most out of this book. And while some lessons are stronger than others, I commend the authors for creating such a useful resource for school librarians.

ATG Reviewer Rating: If I were a school librarian ... I need this in my library. (I want to be able to get up from my desk and grab this book off the shelf, if it’s not checked out.)


Reviewed by Steven W. Sowards (Associate University Librarian for Collections, Michigan State University Libraries, East Lansing MI) <sowards@msu.edu>

Part of the Salem Decades series, this set identifies significant people, events and trends in the United States between 1910 and 1919, especially for undergraduates exploring topics. Essays deal with such milestones such as the New York Armory Show of 1913, World War I, labor unrest, and the condition of women and minorities. Over half of the 285 articles are biographies, ranging from Charlie Chaplin, the silent film star, to W.E.B. Du Bois, the African American activist and editor. Articles open with a concise note about significance and end with suggested readings. There are some illustrations and quotes from primary sources. Supporting features include a glossary, a browsable list of essays by category (such as politics or religion), and a subject index. Thomas Tandy Lewis has edited similar sets for the 1930s and 1940s. A retired historian of the U.S. Constitution, here he writes about Supreme Court cases, among other articles. Many others come from Michael J. O’Neal, another former editor and freelance writer.
Some content is repurposed from earlier Salem Press publications. For example, the article on the Treaty of Versailles is based on an essay in Great Events from History: Modern European Series (Salem Press, 1973) with extensive revisions and a refreshed bibliography. The article on Carrie Chapman Catt is almost unchanged from Great Lives from History: The Twentieth Century (Salem Press, 2008). While nothing in the front matter alerts librarians to the potential for overlapping content, the question is “should this matter?” If so, the main point may involve accuracy, especially the value of very current content. Researchers insist upon the latest findings in the sciences: should the same be true for history? Deficits in current content incorrectly imply a lack of debates or new discoveries in the humanities: for example, nothing here reflects recent criticism of the depiction of Native Americans by Laura Ingalls Wilder.

Competing publications are single-volume works. In Gale’s 11-volume American Decades set, Volume 2 covers 1910-1919. The 1910s (1910-1919) edited by Michael Shally-Jensen, also from Grey House Publishing (2016), analyzes key documents such as Woodrow Wilson’s Fourteen Points. The 1910s by Stephen Feinstein (Enslow Publishing, 2015) is aimed at young adults. The 1910s by David Blanke (Greenwood Press, 2002) limits itself to popular culture. The 1910s by John F. Wukovits (Greenhaven Press, 2000) offers essays by heavy hitters from the historical community, such as Philip S. Foner and Ernest R. May. With three volumes, Lewis has room to offer more topics and biographies.

The real competition for student attention may be Wikipedia. How do internet resources compare to a traditional reference source? Reference value involves accuracy: factual correctness (including current findings or interpretations), completeness, relevance, balance, and objectivity. In an era of alternative facts and fake news, accuracy from verified authority ought to benefit traditional reference tools. Lewis has a track record; so does Salem Press. We can evaluate the list of 200 contributors: a mix of professors, graduate students, and independent scholars. Student readers will not care, but librarians should.

Comparing these volumes to Wikipedia, topic coverage is comparable, but editorial balance favors Lewis. The first ten articles cover Robert S. Abbott, African-American newspaperman; the Abrams v. United States First Amendment case; Jane Addams, social worker; Felix Adler, social reformer; African-Americans in World War I; Agriculture in the 1910s; Aircraft in World War I; the Alien Land Law of 1913; the American Friends Service Committee; and the American Tobacco Company anti-trust case. Lewis’ articles consist of two to six pages. Wikipedia has articles for eight out of ten entries, and covers the other two (African-Americans in World War I, and Woodrow Wilson) in multiple articles or sections. However, the Wikipedia texts vary in length from a few hundred words to 7,000 words, reflecting contributor enthusiasm rather than editorial judgement. If students need consistent, concise topic introductions, then Lewis’ set has the upper hand.

**ATG Reviewer Rating: I need this in my library. (I want to be able to get up from my desk and grab this book off the shelf, if it’s not checked out.)**


Reviewed by Steven W. Sowards (Associate University Librarian for Collections, Michigan State University Libraries, East Lansing MI) <sowards@msu.edu>

When librarians are asked to employ an RFP — or request for proposal — the stakes are usually high. The necessary attention to detail can be daunting, even for a librarian used the process. Our boards, procurement offices, or other outside entity may scrutinize the results. The *Complete Guide to RFPs for Libraries* speaks to the particulars of representative RFP situations, to demystify the process and break it down into practicable steps. This anthology of essays begins with introductory chapters about the concepts behind the RFP system, and summarizes the elements and steps to be followed. Eleven chapters then go into detail about common situations such as RFPs in a consortial environment, and selection of a serial vendor, a binder, a disaster recovery service, an RFID system, an integrated library system (ILS), or a digitization service. The final section offers the vendor’s perspective including expectations about fair dealing and professional practices: transparency, confidentiality, conflict of interest, and ethical decision-making.

The presentation of information can be highly specific and sometimes dry. To make the content more accessible, the book not only provides an index and a detailed table of contents, but also employs tables, figures, bullet point lists, and numerous subheadings. The reader can go directly to relevant information, while also through keeping track of how each step fits into a context of preparation and implementation. Chapter 8 — on RFPs for integrated library systems in academic libraries — and Chapter 10 — about RFID security and inventory systems — include practical examples of evaluation criteria and the use of grids for scoring and comparing proposals. Chapter 4 — on the selection of a serial vendor — and Chapter 6 — on RFPs for K-12 collections at the school or district level — provide sample timelines. Two case studies describe selection of an ILS by a consortium, one for academic libraries and one for public libraries. Through examples, the reader can see the total RFP process from planning and committee formation, to evaluation, negotiation and eventual implementation.

A glossary explains terms of art in the acquisitions process, and the differences between commonly used acronyms such as RFI, RFP and RFQ, and the unrelated RFID. Most chapters conclude with a list of relevant books, articles and websites for further reading. An eBook version is available.

Frances C. Wilkinson has written extensively about library acquisitions and administration. She is the Senior Associate Dean of University Libraries at the University of New Mexico. Sever Bordianu is the Director of Technical Services, and Outreach Librarian for Philosophy/Religion, Foreign Languages and English, also at the University of New Mexico Libraries. Twenty other contributors from the United States and Canada include librarians with expertise in technical services, acquisitions or administration; officers in library consortia; and representatives from the publisher and vendor side.


**ATG Reviewer Rating: I need this in my library. (I want to be able to get up from my desk and grab this book off the shelf, if it’s not checked out.)**


Reviewed by Presley Dyer (Catalog Librarian, Tennessee State University) <adyer4@tnstate.edu>

On the surface, one’s career growth appears to be one where the only advice you need is to follow common sense. An individual selects their chosen career, she or he masters the given job skills, and then with time, advances up the career ladder. Simple, right? Unfortunately, it’s not quite so straightforward. We now live in a world where new technologies emerge onto the scene at such a pace that innovative skills are continuously needed. What worked five, three or even one year ago may already be replaced and updated in order to meet the demands of what is
Considered the next best thing. Such rapid changes have therefore created an unpredictable workplace, one in which an individual must responsibly learn and navigate. Thus, this makes career growth even more challenging and overwhelming, especially in the library profession where change is spotlighted. Change brings major responsibilities to the libraries, and library employees must embrace it if they want to ultimately succeed personally and professionally. The question then is, “How?” How does one become successful in an environment where uncertainty plays a major role? This question and more can be found in Caitlin Williams’ Be Opportunity-Minded: Start Growing Your Career Now.

Williams, a professional development consultant, has spent over 30 years working as a career success coach. She works with the American Library Association to enrich library professionals with career-enhancing tools and resources. She has also written several books and articles on the subject in addition to numerous speaking engagements. She knows that accomplishments begin with valuing oneself and spending a great amount of time evaluating skills, abilities, and talents. After acknowledging such assets, one can then begin to recognize just how many opportunities are out there for individuals with a growth mindset.

Opportunity-Minded shows how passionate and devoted Williams is to career development. Her writing illustrates how she wishes to motivate people with inspiration and positivity. There is no doubt that she wants people to thrive in their careers and she does a great job of taking such a broad topic and narrowing it down into a clear, precise framework that highlights the essentials. The book has nine chapters covering topics such as workplace changes, self-assessments, and growth opportunities. She also includes two useful sections called “Notes to Myself” and “My Going for It! Growth Plan.” These sections provide an opportunity where she asks herself reflective questions and provides the readers for space to jot down their own ideas as well.

Essentially, one can view this book as a self-reflecting journal. Chapter 4 is even titled “How Well Do You Know You?” which dives deep into the importance of knowing not only one’s skills but also one’s strengths and aspirations. In providing this chapter, Williams is encouraging the reader to better understand her or his career and where they would like to go next. Neither this book nor our profession is designed for the “quick fixes” to one’s career. Since growth plans change, individuals need to be mindful that their career is a never-ending, learning process. After all, opportunities are everywhere. Now, the question is, “Are you ready for them?” After reading Williams’ motivational words, I can say, “Yes, I am.”

Opportunity-Minded is an invaluable book that nearly anyone who works in the library profession would find beneficial. It is filled with opportunity-minded tips and strategies which can jumpstart or rejuvenate a person’s career if put into action.

ATG Reviewer Rating: I need this book on my nightstand. (This book is so good, that I want a copy close at hand when I am in bed.)

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**Booklover — Better Late Than Never Summer Reading**

Column Editor: **Donna Jacobs** (Retired, Medical University of South Carolina, Charleston, SC 29425) <donna.jacobs55@gmail.com>

The next choice for this Booklover is a more stereotypical summer read than the previous work by Wolfe Soxinka entitled Civilian and Soldier. A work of fiction, Jenny, a novel by Sigrid Undset, is described in the inside flap of the book cover as “an important and courageous work, but some found it to be ‘immoral.’” The description continues with more enticement: “The novel tells the story of Jenny Winge, a Norwegian painter, who goes to Rome to seek artistic inspiration but ultimately betrays her own ambitions and ideals.” Jenny is included with other works, Thjodolf Simonson, a sampling of Undset’s personal letters, and an “Introduction” by Tim Page, a Pulitzer Prize winner on staff at the Washington Post, in The Unknown Sigrid Undset. The inside flap of the book cover alerts the reader that Jenny is a new translation (2001) by Tiina Nunnally and this translation “captures the fresh, vivid style of Undset’s writing and restores passages omitted from the 1921 English version.” A comfortable chair, a little time, and soon I’m in Rome with Jenny who is trying to navigate the world, an artistic career, relationships, romance, and all the entanglements that come with this journey.

Sigrid Undset won the 1928 Nobel Prize in Literature “principally for her powerful descriptions of Northern life during the Middle Ages,” her work that is usually referenced with the award is Kristin Lavransdatter, a trilogy set in medieval Norway. (Jenny is not representative of this body of her work; rather this story comes from her early “realistic” period where she focused on women and love.)

Tim Page’s “Introduction” to The Unknown Sigrid Undset is in itself a delightful read. Right from the first paragraph his perspective is: “Still, unless a present-day English-speaking reader happens to be of Scandinavian descent, the Catholic faith, or unusually interested in world literature, the name Sigrid Undset will likely draw a blank.” (Sidebar personal bio: English-speaking, not Scandinavian, raised Catholic, interested in world literature — I guess I’m reading the right book.)

Undset was born in Kalundborg, Denmark in 1882. Her father, Ingvald, moved the family to Kristiania (Oslo) in 1884 where he accepted a post with the university museum. Her parents were keenly aware of her intellect and from an early age spent great effort in her intellectual cultivation. Discussions on history, politics, archaeology, and the Old Norse language were dynamic between father and daughter. This all came to an unfortunate end when her father succumbed to malaria when she was 11 years of age. The family struggled on a small state pension provided to widows. This struggle could be the reason behind Page’s description of Undset as a “quiet, dutiful, highly serious, and somewhat remote young woman whose closest companions were her books.” Not to be daunted by circumstance, she attended a commercial college and then took a secretarial position at Wisbech Electrical Company at the age of 16. She persevered for ten years at this job that she hated. During these ten years she must have been writing, for Page relates this interesting anecdote about her coworkers: “During one midmorning break she was heard chuckling over something she was reading. “It was a piece she had written herself,” according to her first biographer, A.H. Winnes. “She read it to the others. It was written with such ‘warmth and humor,’ say her colleagues, ‘that we could not help interrupting — Good Heavens! Why don’t you write instead of sitting in an office?’” I guess we know where this went…

Jenny begins with a young man, Helge, arriving in Rome. “At last, now at last there was one sight that was richer than all his dreams. And it was Rome. A wide plain of rooftops lay beneath him in the hollow of the valley, a jumble of roofs on buildings that were old and new, tall buildings and low buildings. They looked as if they had been put up quite haphazardly and as big as was needed at the time; only in a few places did the streets cut regular clefts through the mass of rooftops. And this whole world of disorderly lines that intersected each other at thousands of sharp angles lay rigid and motionless beneath the pale sky, in which an invisible sinking sun sporadically ignited a tiny rim of light on the edges of the clouds. The sun hung dreaming under a delicate, whitish mist, into which not a single spurting column of smoke blended, because there were no factory smokestacks in sight, and no smoke came from any of the comical little tin chimneys sticking up from the buildings. …And above everything hovered the church domes, a countless number of them. The magnificent gray dome far off in the distance, on the other

continued on page 49
Collecting to the Core — Classics of Sociology

by Cindy L. Craig (Associate University Librarian, University of Florida; Sociology Subject Editor, Resources for College Libraries, 2012-2019) <clcraig@ufl.edu>

Column Editor: Anne Doherty (Resources for College Libraries Project Editor, CHOICE/ACRL) <adoherty@ala-choice.org>

Column Editor’s Note: The “Collecting to the Core” column highlights monographic works that are essential to the academic library within a particular discipline, inspired by the Resources for College Libraries bibliography (online at http://www.rclweb.net). In each essay, subject specialists introduce and explain the classic titles and topics that continue to remain relevant to the undergraduate curriculum and library collection. Disciplinary trends may shift, but some classics never go out of style. — AD

In 1997, the International Sociological Association (ISA) asked its members to list the five books published in the twentieth century that were most influential to their work as sociologists in order to critically assess the “sociological heritage” of the century. The top ten includes works that are foundational not only to the field of sociology, but also to economics, political science, social psychology, and religion. This essay will examine a selection of these titles, some of which are still assigned as required reading in many introductory college courses and endure as classics in the RCL core bibliography.

Perhaps unsurprisingly, two works by Max Weber appear in the top ten. One of the leading intellectuals of his time, Weber (along with Karl Marx and Emile Durkheim) laid the foundation of modern sociology. Economy and Society: An Outline of Interpretive Sociology, originally intended to be part of an edited multivolume encyclopedia, was published posthumously by Weber’s wife in 1921, although the first complete English translation was not available until 1968. Still, Economy and Society was voted the most influential ISA title of the twentieth century. In this magnum opus, Weber synthesized his lifelong empirical research on the comparative histories of the world’s great civilizations. Out of this analysis, he developed an organized system of sociology. Economy and Society is perhaps most famous for its detailed description of the modern bureaucracy. In contrast to the old religious systems that dominated society through charismatic means, he argued that modern society has become dominated by political power wielded through bureaucracies. Bureaucracies are based on the application of reason and impersonal laws wielded by professional experts. Participants obey a hierarchy of rules rather than a hierarchy of people. Because this system of authority is rational, efficient, and stable, participants believe in its legitimacy. Bureaucracies are controlled by a small group of self-appointed leaders. Thus, the quality of life of all members of a society is in the hands of oligarchs.

Weber’s The Protestant Ethic and the Spirit of Capitalism ranked fourth in the top ten most influential books and remains one of the most renowned, and controversial, works in sociology. Originally published in German between 1904 and 1905, the work was first translated into English in 1930 by American sociologist Talcott Parsons. In it, Weber examines the historically peculiar form of capitalism that emerged after the Reformation. Protestants, specifically Calvinists, continually accumulated wealth for its own sake, rather than for any pleasure the profits would bring. They saw it as a moral calling to make money while maintaining a disinterest in worldly luxuries. Weber believed this behavior was motivated by the Calvinist belief in predestination, in which one can never be sure who is destined for heaven. Success in their calling was taken as a sign of being one of the few chosen for salvation. The notion of a calling, which did not exist in ancient societies or religions, projects religious behavior into the everyday world. Weber observed that the impact of the Protestant ethic was strongest in the United States, where it drove the development of industrial centers in the East. Although economic competition, rather than religious values, drives capitalism today, the remnants of this work ethic persist in Americans’ long work hours, scant vacation days, and resistance to taking sick leave.

Coming in second on the ISA list, behind Economy and Society, C. Wright Mills’s The Sociological Imagination carries continued relevance to scholars and students alike. Described by critic Donald Macrae as “an elegant — indeed, sometimes, apocalyptic — writer,” Mills, a sociology professor at Columbia University, attacked his peers’ preoccupation with “grand theory” and “abstracted empiricism” and argued instead for more concern with social policy and opposition to major concentrations of power. Unsurprisingly, this book was not well-received at the time of its initial publication in 1959. Mills described the problem of individuals in mass society being “gripped by personal troubles” without understanding how these problems interact with social issues. It is the true job of the social scientist, then, to help individuals develop the ability to understand the relationship between one’s experience and wider society. As defined by Mills, the sociological imagination can be applied to any seemingly mundane behavior. For example, continued on page 50

Booklover
from page 48

side of the place where Helge caught a glimpse of the flowing river, that was the Basilica of St. Peter.” This poetic, rambling, travelogue description continues until Helge meets two young women, one of whom is Jenny. With the beauty only a wordsmith of Nobel caliber can ink, Undset leads the reader through a complex investigation of young romance combined with youthful career dreams and a touch of wanderlust. “That’s the wonderful thing about going abroad — all influences of the people you happily to live with back home are suspended. You have to see things with your own eyes and think for yourself. And you realize that whatever you get out of the trip will depend entirely on you: what you’re capable of seeing and comprehending, and how you behave, and who you choose to have an effect on you. And you learn to understand that what you get out of life depends solely on yourself. Yes, a little on circumstances, of course, as you said before. But you find out how, in accordance with your own nature, you can most easily overcome or get around obstacles — both during your travels and in general. You discover that the worst difficulties you encounter are usually things you’ve brought on yourself.”

With that I will let you discover where Undset takes Jenny — it’s a page-turner.

Epilogue. Included at the end of The Unknown Sigrid Undset is a sampling of personal correspondence between Sigrid Undset and Andrea Dea Hedberg. (The translator’s note tells the story of this 40-year-old pen-pal relationship.) It began about the time Undset took the secretary job. She joined a Swedish pen-pal club and within a few months received her first letter from Dea. Dea was the same age, the daughter of a bookseller and an avid reader. In their letters they share their dreams of writing — Dea would pursue journalism. Their relationship was forged on paper as they only met in person a few times.

I’ll leave you with one small excerpt: “April 3, 1900. Dear Dea! Undset begins this letter apologetic for not writing sooner; describes how the ‘very thought of the office makes me sick’; her ‘artist temperament’ — “There’s nothing I have greater contempt for than artists...” and how she struggles with her dreams to write — “Sometimes I want so much to write a book. The way I envision it in my mind, both the plot and the characters are good, but I’m afraid I’ll never have the skill to portray any of them — let alone be capable of writing it all down.” Twenty-eight years later, she had won the Nobel.
drinking a cup of coffee can be viewed through several contexts: as a social ritual, as the use of a socially acceptable drug, and as one’s participation in a social enterprise. In another example, one’s inability to pay the rent, through the lens of the sociological imagination, is recognized as the result of social problems such as economic inequality and structural poverty — issues that greatly concern social scientists (as well as activists) today.9

What is reality? In their text *The Social Construction of Reality: A Treatise in the Sociology of Knowledge*, sociologists Pierre L. Berger and Thomas Luckmann make the bold claim that reality only exists because we act as if it does through our social actions.9 As people and groups interact with each other in a social system, they behave as if they were following conventional rules. But they are, in fact, actively shaping and maintaining a shared reality through conversations. If actions are reinforced long enough, they eventually become embedded in society as institutions. As young children, we come to accept institutions that existed before us through the process of socialization. Interestingly, Berger and Luckmann eventually abandoned the concept of social constructionism in their later scholarship. However, the ideas in their shared work expanded across various disciplines in the social sciences and humanities.10

In *Distinction: A Social Critique of the Judgment of Taste*, author Pierre Bourdieu describes how those in power define “taste,” and how one’s distinctions are based on social class.11 Born and raised in a remote French village, Bourdieu made his way to an elite school in Paris. Observing how much easier it was for those raised in the city to fit into academic life, he decided to focus his sociological research on cultural practices and institutions. *Distinction*, first published in 1979 and translated into English in 1984, is an ambitious synthesis of his body of work up to that point. He gathered survey data from 1,217 respondents about their preferences for food, music, art, and leisure activities. Bourdieu concluded that an individual’s taste is informed by one’s cultural capital, which is provided by schooling and family upbringing, as well as by one’s economic capital. Individuals situate themselves in society partly by the things they choose to buy, say, and do. This book is not without its critics: it has been called “self-consciously diffuse” and “an extremely difficult book to read.”12-13 (In the book, Bourdieu defends his meandering writing style as necessary to capture the complexity of the topic.) Also, his findings were based on the rigid social structure of Europe, and may not be as applicable to the more fluid society of the United States. Despite its faults, this work is distinct for its emphasis on the importance of cultural capital, not just wealth, to determine class positions, making it an important contribution on cultural hegemony.

“All the world’s a stage, and all the men and women merely players.”74 Sociologist Erving Goffman gives this Shakespearean notion serious consideration in *The Presentation of Self in Everyday Life.*75 Originally published in Scotland in 1956, then in the United States in 1959, it is Goffman’s first and most famous book. In it, Goffman outlines his dramaturgical model of social life, in which each face-to-face interaction is a scene requiring performances from its actors. People are assigned parts to play, and their parts are sustained both by the expectations of others and the motivations of the actors. Each actor engages in impression management, which is an attempt to communicate to the audience a particular image of herself. To do this, actors may use clothing, props, and décor as well as specific behaviors to enhance the performance and performances may be altered to match different audiences and settings. While Goffman’s work predated digital technologies, his ideas have influenced recent scholarship on the ramifications of email, mobile devices, and social media on impression management.16 For instance, those supposedly authentic vacation photos posted on your friend’s Instagram account are really a performative turn. As Wesley Shrum noted, “the presentation of self on YouTube is everything Erving Goffman could have imagined…YouTube is everyday life, only more so.”17

The remainder of the ISA top ten list contains works by theorists who still influence sociology today. Talcott Parsons outlined in *The Structure of Social Action* that sociology should pull away from reductionism and instead focus on meaningful social action, that is, what people voluntarily choose to do.18 Robert K. Merton and Jürgen Habermas both rejected the notion that an all-embracing, unified theory of society was possible. In *Social Theory and Social Structure*, Merton instead opted to develop theories specific to certain aspects of society, including deviant behavior, social perception, reference groups, and social control.19 In *The Theory of Communicative Action*, Habermas posited that a vibrant participatory democracy is based on consensus, reasoned argument, and cooperation.20 Finally, in *The Civilizing Process*, Norbert Elias analyzed medieval court life and concluded that civilization is not created intentionally, but emerges out of the complex, interdependent relationships between human beings.21 While the landscape of sociological scholarship has significantly expanded — both in subjects and viewpoints — in the late twentieth and early twenty-first centuries, these classic works continue to provide a “sociological heritage” for today’s students and researchers.22

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**Endnotes**


*Editor’s note: An asterisk (*) denotes a title selected for Resources for College Libraries.*
On October 18, 2018, President Trump signed the Music Modernization Act that was created to update the U.S. Copyright Law to contend with the numerous streaming online platforms. The significance of the Act was the support for artists, producers, and copyright owners. First, the law provided compensation for producers and engineers through the Act. Secondly, compensation was provided for copyright holders pre-1972 recordings. Finally, the Act addressed the streaming technology and compensation to copyright holders by allowing copyright owners to receive royalties easier.

Prior to this Act, the first major law to address the digital age was the Digital Millennium Copyright Act in 1998 (DMCA). According to the U.S. Copyright Office, “the Digital Millennium Copyright Act provides for the implementation of the WIPO (World Intellectual Property Organization) Copyright Treaty and the Performances and Phonograms Treaty, limited online infringement liability for online service providers, and created a form of protection for vessel hulls, and clarified the role of the Copyright Office.”

The importance of the DMCA is that it addressed the issue of online copyrighted material. The Act allows online service providers to utilize the “notice-of-takedown” procedure, which protects the online service provider from copyright liabilities, while assisting copyright owners with securing their rights. Currently, these two major Acts have benefitted copyright holders and addressed the continuous change in technology in the United States. Recently, the European Union enacted a change in their copyright laws through the Digital Singles Market Directive.

It had been nearly 20 years since the European Commission revised and updated the copyright laws for its members in regard to online information and technology. The most recent activity regarding digital copyrights was in 2014, as the Court of Justice of the European Union addressed online copyright issues with the ruling regarding hyperlinking to copyright material. The court defended copyright holders that have copyrighted material online from links to their works by others. The courts stated that the copyright holders can protect their online works through restrictive access tools and the copyright owners will be able to take action against infringed works by those linking to their copyrighted works.

Based on technological changes, the European Commission began to create new legislation to meet the demands of online copyright laws in 2016. According to the European Commission, “Europe needs to seize the opportunity and take the lead in updating copyright rules to support its culture and be competitive.” The Commission noted that 72% of Internet users read online news sites, 56% of Internet users listen to music online, 66% of Internet users watch videos from commercial or sharing services, and 42% of Internet users watch Internet streamed TV from TV broadcasters. The legislation was created to assist the 11.65 million jobs in the creative industry that contributes to €915 billion per year as part of the 6.8% of Europe’s GDP.

The European Commission described the goals of the new copyright legislation. First, the clearer digital rights and fewer worries for citizens’ goal is to ensure that Internet users will not have to worry about violating copyright laws by placing the burden on online platforms. They will also provide information on those copyrighted materials that have been removed due to copyright, which would allow for the appeal of the removal. In addition, Europeans will have access to books, films and audio works that were no longer commercially available in Europe through on-demand providers, as well as sharing copies of paintings, sculptures, and other works of art in the public domain without fear of copyright infringement.

The second goal of the new legislation is to provide more control for creators of audio-visual, music, films, songs, etc. of their uploaded materials and to be compensated for the uploads. The press publishers also have the right to negotiate better pay for the use of their newspapers and magazines by online services and the journalists will receive revenue through this agreement.

The final goal is opportunities for science, education, and cultural heritage stated by the European Commission, “Students and teachers will be able to use digital materials and technologies for learning without facing copyright-related restrictions in their digital teaching activities.” The goal also allows European museums, libraries, film archives, and other cultural heritage institutions to digitize cultural works.

Based on these goals, the European Commission began to update the European copyright laws for the digital demands. The European Commission noted, “The new copyright rules strike the right balance between the interests of different players in the digital environment — authors, other creators, and the press sector are better off, Internet users are better protected and the obligations online services are proportionate.” The commission’s goals was to provide “clearer digital rights and fewer worries for citizens, a better deal for all creative sectors and the press, more opportunities for science, education, and cultural heritage, and fair remuneration for individual creators and journalists.”

Due to the changing online commerce, the European Commission created the “Directive on Copyright in the Digital Single Market” that has already provided numerous debates for and against the legislation. The Council of the European Union approved the directive on April 15, 2019. This leaves the 28 European members two years to establish and enforce the new copyright law, which can also have various interpretations once the members have complied with the law.

Some of the issues that have brought attention to the European Union’s copyright law include censorship, free speech, intellectual property, amount of content available, and criminal copyright law procedures. However, artists, publishers, and legislators state that the copyright law meets the demands of the digital era. Due to the controversy, the European Commission, on August 28, 2019, called for open discussion regarding the legislation that would invite all stakeholders to “discuss best practices on how content-sharing platforms and service providers should cooperate with rights holders.”
Legally Speaking
from page 31

Before the European Parliament voted to approve the copyright law, online platform providers that includes Google, YouTube, Facebook, Instagram, and other sharing platforms opposed the legislation. The reason the sharing platform providers opposed the legislation is based on Article 17 that requires the platform providers to install filters to catch copyright violations. In addition, the legislation is requiring a “link tax” for online platforms. According to Andrew Tyner (J.D. Candidate for 2020), the link tax “requires online platforms to pay fees to news outlets and other content creators for news shared on their sites.”

The legislation also caused protest from Internet users through the www.savetheinternet.info website that documented over five million petition signees. The concern regarding the filter was based on the concept that the filter could over block content and even filter content erroneously. The responsible party for copyright infringement on the Internet is placed on Platform Sharing Online Services, such as Facebook or YouTube. Tyner stated, “if a user shared a copyright protected song on YouTube without first licensing it, YouTube would be liable.” In addition, this issue is unclear for other types of informative platforms. For instance, blogs or RSS feeds similar to Google and Yahoo News may fall into this category. According to Marcello Rossi (The Journalism Company Nieman Lab), there was mention that Google News would shut down, which they had done previously in Spain due to a similar law.

The new copyright laws are up to the member countries to determine how to implement these laws based on the requirements set forth by the European Commission. Finland, Italy, Luxembourg, the Netherlands, Poland, and Sweden were the European members that also opposed the legislation, whereas Belgium, Estonia, and Slovenia abstained from the vote. Foo Yun Chee noted, “Google said the new rules would hurt Europe’s creative and digital economies, while critics said it would hit cash-strapped smaller companies rather than the tech giants.” Representatives for Poland also noted that the requirement to filter would lead to censorship. Rossi noted that Google stated the company had already spent more than $100 million dollars on the Content ID service.

YouTube would have issues because they are required to receive permission from the rights holders of songs users upload. The concern for YouTube and Internet activists is the system used to enforce copyright infringement. Currently, YouTube uses the Content ID to enforce copyright, which cannot locate all copyright infringement content. Google also makes the argument that it would be extremely complex to locate all copyright holders to negotiate agreements.

As for the book publishing industry, the new Digital Single Market addresses digitalization practices for libraries, education, museums, and cultural heritage preservation projects. Jadziej Maciejewski (Cracow University of Economics, Faculty of Economics and International Relations, Department of European Economic Integration, Krakow, Poland) stated, “The book market in Europe is characterized by diversity and fragmentation in comparison with, for example, the American market, and is losing its share in the global book market with the development of book markets in emerging markets.” He noted that the European Union implemented the Digital Single Market Strategy “to meet the challenges of the ongoing digitization” which controlled about 6-7% of the European book market. The new legislation “will create a new legal framework for European book markets.”

According to Maciejewski, the United States had 26% shares of the world book market, followed by China with 12% in 2014, whereas The United Kingdom, Germany, and France collaboratively held 15%. However, the new legislation addresses the use of digitization and eBook lending that will change the book market in Europe. The new law will increase the digitization of out-of-commerce books, by working with copyright holders and publishers, as well as relieving the restrictions on licensing agreements for eBook lending. Currently, most European publishers do not license eBooks for lending or interlibrary loans.

Further information about the impact of the new Digital Single Market directive will be more evident as members of the European have two years to implement the law and analyze the impact through the court systems. According to the opponents, the copyright changes place more control to the copyright holders, which are considered by the opponents as a restriction towards the freedom of speech and the lack of access to information. Tyner stated, the copyright directive’s “overreaching, copyright protections will weaken online platforms’ ability to do business cheaply, curb Internet users’ ability and willingness to share information or expression, and encroach on Internet users’ privacy rights in the online space.”

References


Rumors
from page 37

four generations of Morgans and the powerful, secretive firms they spawned, ones that would transform the modern financial world. Tracing the trajectory of J. P. Morgan’s empire from its obscure beginnings in Victorian London to the financial crisis of 1987, acclaimed author Ron Chernow paints a fascinating portrait of the family’s private saga and the rarefied world of the American and British elite in which they moved — a world that included Charles Lindbergh, Henry Ford, Franklin Roosevelt, Nancy Astor, and Winston Churchill. A masterpiece of financial history — it was awarded the 1990 National Book Award for Nonfiction and selected by the Modern Library as one of the 100 Best Nonfiction Books of the Twentieth Century — The House of Morgan is a compelling account of a remarkable institution and the men who ran it, and an essential book for understanding the money and power behind the major historical events of the last 150 years.

I am sure that you have noticed that I am a huge lover of all kinds of books. I was interested to read The Association of American Publishers (AAP) StatShot report for October 2019 reflecting reported revenue for all tracked categories, including Trade (consumer publications), K-12 Instructional Materials, Higher Education Course Materials, Professional Publishing, and University Presses. Paper formats continued to dominate Trade, accounting for $528.6 million, or 79.9% of the category’s $661.2 million in revenue continued on page 39
QUESTION: A medical librarian asks about using charts and tables from articles, which the library treats as a one complete work. Is this correct?

ANSWER: Technically, charts and tables are separate graphic works. How to treat them depends on the following. If the author of the article or book authored the chart and they have not been separately published nor published elsewhere, then the chart is a small part of that article or book. Reproducing it would count as copying a small portion of the work. By contrast, if the chart is authored by someone else and is used in that book or article with permission, then it must be treated as a separate work and permission would be required from the original producer of the chart.

QUESTION: A publisher inquires about the recent French dispute over the old photographs in the Zervos Collection. De Fontbrune sued Wofsy, who is an American art editor, obtained permission from the original producer to seek permission. The French court ultimately found that Wofsy’s use of the Zervos photos infringed copyright. The court prohibited Wofsy from future use of the photographs and imposed a fine of approximately $1,680 for each future use of the prohibited works.

Almost a decade later, copies of The Picasso Project were found in a French bookstore. De Fontbrune sued to enforce the previously awarded fine that resulted in a 2012 judgment against Wofsy of $2.2 million. To enforce the French judgment against Wofsy, de Fontbrune sued in California state court under the state’s Uniform Foreign-Country Monetary Judgments Recognition Act (most U.S. states have a similar statute).

Wofsy successfully argued that the French judgment contravenes fundamental U.S. public policy that favors free speech and promotion of the arts. According to the court, fair use would also prevent recognition of the French judgment and The Picasso Project was fair use as it was published as a reference work for libraries, academic institutions, art collections and auction houses. Regardless of the merits of the judgment in France, free speech is grounded in the U.S. Constitution and anything that contravenes it is repugnant to U.S. public policy.

QUESTION: A college librarian asks if borrowing textbooks through interlibrary loan violates copyright.

ANSWER: The simple answer is no. Textbooks are not treated differently from other books for ILL purposes. Borrowing the textbook for a user is no problem, unless the library that owns the work has signed a license agreement not to lend the work to anyone outside of its own institution. In that case, any infringement would be on the part of the lending library and not the borrowing one. The borrowing library should not copy the work, other than small portions, for library reserves or for users, however.

QUESTION: A researcher asks about scientific charts and tables of data. If someone takes this information and creates his or her own depiction of the data is this copyright infringement?

ANSWER: The data contained in scientific charts, graphs and tables is factual and facts are not copyrightable. The presentation of the data in a chart or other graphic depiction may be copyrightable as a graphic work, however, if the chart is sufficiently original. This means that someone else can take the data to create another graphic depiction and claim copyright protection for the new presentation of the data. He or she should cite where the data was previously published, however.

QUESTION: A university librarian inquires about the new search engine for digital images introduced by the Creative Commons.

ANSWER: The Creative Commons introduced CC Search, which is described on the CC website as “a tool that allows openly licensed and public domain works to be discovered and used by everyone.” It currently covers more than 300 million images and aggregates across multiple repositories into a single catalog from 21 major collections such as major museums and Flickr. Moreover, it facilitates reuse of images through machine-generated tags and one-click attribution.

The CC does not verify whether the images are properly CC licensed or if the information is accurate or complete. The CC warns users that they are responsible for independently verifying the license status and attribution information before using the image.

Plans for CC Search include not only images but also additional media types such as open texts and audio. The ultimate goal is to provide access to all 1.4 billion CCC licensed and public domain works on the web.

QUESTION: A college faculty member asks what is the difference between a de minimis amount and a fair use amount.

ANSWER: A de minimis amount is defined by Miriam Webster’s “as lacking significance or importance; so minor as to merit disregard.” A fair use portion is larger than so minor as to merit disregard. One of the four fair use factors is the amount and substantiality of the portion used in comparison to the work as a whole. It is both a quantity and quality test. A commonly cited example of a fair use portion is one article from a journal issue or a single chapter of a book. If the portion reproduced represents the heart of the work, it will fail this test regardless of the quantity copied.
And They Were There

Reports of Meetings — 2019 ALPSP Conference

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ALPSP Conference — Beaumont Estate, Old Windsor, United Kingdom — September 11-13, 2019

Reported by Anthony Watkinson (Principal Consultant CIBER Research) <anthony.watkinson@btinternet.com>

The venue was not far from Windsor Castle and within taxi reach of London Heathrow Airport. Next year it moves to Manchester, the Hilton Hotel, which does also have an international airport with transatlantic flights.

The Association of Learned and Professional Society Publishers is an international membership trade body that supports and represents not-for-profit organizations and institutions that publish scholarly and professional content. With nearly 300 members in 30 countries, membership also includes those that work with these publishers, for example commercial publishers that work as partners but only as associates. It was founded in the UK in 1972 and its representative function is well established there and in Europe, but in the USA it is probably much less well known that the SSP which has a different membership structure and no representative claims. Interesting however ALPSP works closely with the university press community over the Redux conferences now established as a series (https://events.bizzabo.com/redux2020/home). Among those present in 2019 were at least four U.S. university press directors and Peter Berkery, Executive Director AUP, as was Melanie Dolochek, Executive Director of SSP, and Michael Mabe, the retiring CEO of STM. Though the conference remit might be expected to be somewhat narrow there is a wide interest in the concerns of readers of this journal.

The annual conference appears to be thriving under its experienced staff and its new CEO Wayne Sime. Wayne is a highly experienced health librarian with a recent background as the Director of Library Services of the Royal Society of Medicine. There were nearly 400 present including 272 paying delegates compared with 235 in 2018. The app including the programme can be reached from https://www.alpsp.org/Industry-Events/ALPSP-Conference-Awards-2019/60434. There was and is an active Twitter exchange under an ALPSP hashtag and there is another report on the ALPSP blog. A dedicated site is being built to host all of the slides, audio recordings and video footage. The content will include full transcripts that are searchable and closed captioned, as well as being tagged with relevant metadata to make finding and sharing so much easier.

This report concentrates on the plenary sessions.

The first keynote was billed as concerned with The Declaration on Research Assessment (DORA): Opening up the Measure of Success but biologist Stephen Curry ranged widely over a collection of open access sites — not just DORA (www.sfobra.org) which is adopted fully at his own home base Imperial College London but the wider perspective of open science. The big concern is that “Metrics have taken over” and research results are distorted in consequence and so are university rankings (https://events.bizzabo.com/redux2020/home).

The need is for a reform of assessment. DORA and Plan S (see below) press for evaluation of actual content, not judgement of publications by use of proxies. He recognised that lip service could get in the way of actual adoption but some funders (for example Wellcome) are monitoring compliance from their reviewers. The bottom line is that open science can be better science.

Not surprisingly, Plan S was a prime topic. Some additional information will be added to the record of presentations in order to make some of the intricacies clearer.

Learned societies, the representatives of the research communities, were not consulted in advance about Plan S. Soon after the announcement ALPSP provided a formal briefing which did not chide but did seek “engagement”: https://www.alpsp.org/news/20190921plansbriefing.

Three of the plenaries were concerned with the topic, reflecting some level of success. The first of these was on New Horizons in Open Research: Open transitions within Plan S. The moderator was Alicia Wise, now a director of the consultancy Information Power and previously director of Universal Access for Elsevier. She and her Information Power colleague Lorraine Estelle introduced the SPA-OPS project (Society Publishers Accelerating Open access and Plan S) which they led. It was commissioned by Wellcome, UK Research and Innovation, and ALPSP. “This project set out to identify routes (27 business models and strategies) through which learned society publishers could successfully transition to open access (OA) and align with Plan S.”

The collection included a toolkit enabling transformation, bringing together publishers and library consortia who were surveyed. “Such transformative agreements emerged as the most promising because they offer a predictable, steady funding stream.” The conference presentation among the items on this site (https://wellcome. figshare.com/collections/Society_Publishers_Accelerating_Open_access_and_Plan_S_SPA-OPS_project-4561397). There is an article published at https://insights.uksg.org/articles/10.1629/uksg.477/. Estelle emphasised the focus on transformative models: the audience were told it was important to move quickly — pilots had to start by the end of this year in order to meet the implementation deadline. There were other speakers including Rachel Bruce of United Kingdom Research and Information (UKRI), but also of more immediate interest two publishers with different perspectives. Firstly Gaynor Redvers-Mutton of the Microbiology Society representing a relatively small journal publisher previously engaged in mainly green open access without embargoes but now offering as well a publish and read approach stretched for consortia both frictionless for authors and of maximum value for institutions, and secondly Shelley Allen of Emerald Open Research on Supporting the transition to Open within Social Science via an open platform on collaboration with F1000.

The Microbiology Society is a member of the Society Publishers Coalition (https://www.socpc.org/) whose 40 plus (mostly UK) members “share the common ambition to see an orderly and sustainable transition to open scholarship and to improve the efficiency of the scholarly communication ecosystem for the benefit of researchers and society at large in a fair and sustainable way.” It was not clear how much they

continued on page 55
buy into SPA-OPS but some indication can be seen from the record of the fourth plenary (see below) and other additional information from a SocPC member:

The range of opinions about and approaches to Plan S among UK society publishers is wide. Those in the Society Publishers’ Coalition (socpc.org) share a goal to see an orderly, sustainable transition to OA, where sustainability is both financial and, crucially, the ability of all authors to publish without worrying about fees. Having said that, even within Soc PC there is a general consensus that Plan S does not take the very real and valid concerns of the AHSS community into account (as one example).

Many of the societies who are independent publishers, like the Biochemical Society and the Microbiology Society, are making efforts to find ways to transition journals from subscription to OA without putting up paywalls in place of existing paywalls. Previously, these deals were restricted to the bigger society players such as IOP Publishing or the RSC.

The fourth plenary was on Transforming Publishing: Sharing Perspectives on the Latest Models to Expand Open Access moderated by Dan Pollock of Delta Think. Steven Incecoomb, Chief Publishing of Springer Nature was candid. Open Access has been the slowest revolution in history which has suited publishers. Pressure has come from open science. Bigger publishers can more easily handle transformation. Malavika Legge from the point of view of a smaller learned society publisher (and of the society publishers coalition — see above for link) urged her colleagues not to be distracted by the deadline but start from what is possible and listen to researchers. Niamh O’Connor, now recently Journals Publishing Director at PLOS, does not think we have it all sorted. She is herself convinced by open science and starts from there. Ralf Schimmer as Director of Scientific Information Provision at the Max Planck Digital Library represented a flipped institution. For his position see https://oau2020.org/wp-content/uploads/pdfs/B14-14-Ralf-Schimmer.pdf. He wondered when we shall have our Thunberg moment. He thinks it is close. Others were less optimistic. A positive was the proposed rewiring of funding implicit in the Coalition S thinking. As far as open access being the rule/default, publishers present agreed that they were looking to when rather than if.

The closing keynote came directly from within Coalition S: Plan S – The Road Ahead. Johan Rooryck, a humanities professor from Leiden, represents cOAlition S in meetings with external stakeholders including funders, researchers, librarians, and publishers. He has a track record in OA advocacy and practice: see https://en.wikipedia.org/wiki/Glossa_(journal). He presents Plan S, listens to concerns, and develops plans to help participants adapt to a changing publishing landscape. He also advises cOAlition S on the ways to implement the principles in place. He confirmed in answer to a question that there can be no recognition of hybrid models unless as a confirmed step to transition to full open access. Previously, the experience of open access advocates has been that hybrid journals (where researchers can pay to make their article in a subscription journal open access) has not lead to a flip to a wholly open access model: see http://www.researchinfonet.org/finch/ for the evidence. More detailed information is to come but there was a sensation among the audience that someone was listening: Rooryck is a researcher and an optimist. He thinks the rest of the world will follow Europe.

The other two plenaries were in the first place: Breaking the Glass Ceiling convened by Rebecca Asher, Deputy Director of Sense about Science (https://senseaboutscience.org/). One speaker found it helpful to concentrate on discrimination against women rather than such discrimination being part of a wider diversity panel. There were two publisher speakers: Amy Brand, Director of MIT Press. Sarah Greaves, Chief Publishing Officer of Hindawi and Alison Lang, Medical Researcher and Publishing Director of BMJ with a chemist Lesley Yellowlees, who holds a personal chair at the University of Edinburgh. Professor Yellowlees agrees that there have been positive changes in the Academy but they have been glacially slow compared with publishing which she rather envied. The publishers tended to agree but insisted that ongoing vigilance is important.

Secondly: The Changing Copyright Landscape across the World and the Impact of Brexit. Presumably the nature of Brexit could reasonably be expected to have been settled by the time the presentation was given but it had not been. The speaker was Elizabeth Ribbons of the British Copyright Council. Whatever the relationship between the EU and the UK turns out to be, the Berne convention will have been signed by all players.

Other presentations included an unusual take on data management moderated by Dan Pollock of Delta Think — Does Data Mean Dollars? Among the insights were the following:

- Data is growing beyond our capacity to manage it. If you could store data at the atomic level, at current rates of data growth, in 180 years we will have used every atom on the planet.
- Much data is gathered now in raw form, in case it is useful in future. So those who may in future benefit from data gather today are not paying for it. We need to view data as we would an insurance valuation and consider it a tangible balance sheet asset.

Another session also produced new insights in a familiar context. This one was a panel on Working with Early Career Researchers of serious interest to librarians and to publishers. The chair was Heather Stanies, now Head of Partnerships at the MIT Knowledge Futures Group. Whether in the sciences or in the humanities, early career researchers have a lot on their plates. In addition to their day jobs in labs, archives, or lecture halls, we expect them to publish, participate in service activities such as peer review and begin to train even earlier career researchers and students. How can we best help them navigate this challenging time? How can we engage them in service activities, conference participation, publications, and more? What can we learn from them in their support for sharing research early (preprints or journals clubs), transparency around publishing and beyond?

There were two sessions concerned with books and what can be done with them. There was a session on open books with a strong emphasis on open source chaired by Simon Ross CEO of the Manchester University Press with speakers comprising Staines, again talking this time about Pubpub (https://www.pubpub.org/). Anke Beck CEO of InTech, Alison McGonagle-O’Connell, Editoria Community Manager, Coko Foundation describing the tool they built with the California University Press, and Charles Watkinson, Director of Michigan University Press, describing several initiatives aimed at measuring Open Access eBook usage. Watkinson also spoke at the second session on the Future of the Book, chaired by Christine Tulley of Findlay University, this time on New Models for eBooks and reflective scholarly works. In this session there were also presentations from Ros Pyne of Springer Nature on the first book created using machine learning — see https://www.theverge.com/2019/4/10/18304558/ai-writing-academic-research-book-springer-ner-artificial-intelligence and John Sherer Spangler Family Director of University of North Carolina Press under the provocative title: From Suspicion to Sustainability: How Open Access can Save the Humanities Monograph.

There were two awards given at the conference dinner which were as follows:

- ALPSP Award for Contribution to Scholarly Publishing — ALPSP Council was delighted to present this year’s award to Ann Michael. Ann founded Delta Think the strategic consultancy, recently transitioned to Chair of the Delta Think Board, and now serves as Chief Digital Officer for PLOS.
- ALPSP Awards for Innovation in Publishing — The winner of the 2019 ALPSP Awards for Innovation in Publishing is scite. scite.ai is a platform to evaluate the reliability of scientific claims. Its deep learning models, combined with a network of experts, automatically extract and classify references to a scientific claim (citations) as supporting, contradicting, or mentioning. This information helps researchers, organizations, and the public to assess the veracity of published research and, consequently, researchers and institutions at unprecedented speed and scale.
One of the key contributors to the last heyday (2015-2017) of the Association of American Publishers’ Professional and Scholarly Publishing Division’s (AAP/PSP) annual conference was Darrell Gunter. Genial, elegant, knowledgeable, and sharp, Darrell ran a plenary session, called The Innovators, that usually closed out the conference, which was held in Washington in early February. Despite being at the end of a long program spread over parts of two days, with a full day in between, and with Washington weather not at its best (there were blizzard forecasts on the eve of the conference’s last day in 2013), the sessions were well attended.

The format was a simple one: representatives from entrepreneurial organizations would speak about products and services their companies offered, Darrell would ask questions himself, and then he would solicit further questions and comments from the audience. Darrell told me in a phone call in early November 2019 that he didn’t want to give sales pitches. He simply wanted them to describe what their companies were actually doing. Conference attendees must have been comfortable with the ways the presentations were tilted because the sessions went on for five years until the annual conference was suspended and changed. In any case, the sessions didn’t veer off into replicas of Shark Tank TV episodes — no one in the audience offered on the spot to buy a stake in any of the companies — which isn’t to say that arrangements might have been worked out later between the innovative companies and publishers and other organizations where conference attendees worked.

With his wide-ranging professional experience, Darrell Gunter was well-positioned to moderate these sessions before a publishing audience. A 1981 graduate of Seton Hall University, with a 1991 master’s from Lake Forest University — both degrees are in business administration — he worked in marketing, sales, and management at Xerox, Dow Jones, Elsevier, Colleaxis Holdings, and the American Institute of Physics before starting his own management consulting firm, the Gunter Media Group, in November of 2010. The majority of Darrell’s clients are in publishing. Since 2009, he’s taught undergraduate and graduate courses in professional selling at Seton Hall’s Stillman School of Business Administration, and he’s taught at seminars held before PSP annual conferences.

Darrell was also co-chair of the PSP division’s committee on digital innovation. That was a springboard of sorts for his sessions at PSP annual conferences. Darrell wasn’t looking for entrepreneurs who were starting publishing companies or selling such traditional services as typesetting, printing, and wholesaling. Instead, he wanted conference attendees to hear from companies that were providing services that publishers needed to succeed in the digital era. That so many such companies have been founded over the past two or three decades testifies to the changing nature of PSP publishing, and its relationship with authors, researchers, and libraries. The entrepreneurial companies Darrell was looking for — the key criterion for how he selected companies for his sessions — he told me, “had to be relatively new and had to be doing something innovative that would help the industry do better.”

Darrell used his industry contacts and Google searches to find these innovative companies. Over 20 of them presented in the five years he ran his sessions on innovation. I was at four of the five sessions in my role as PSP annual conference chronicler. (Barbara Ford covered the 2016 conference in my absence that year.) Our reports on the conferences appeared in the PSP Bulletin, which was published three or four times a year. What follows are brief and very lightly edited excerpts from my and Barbara’s reports. (The full reports can be found at publishers.org/our-markets/professional-scholarly-publishing/psp-bulletin.) They give a flavor of what it was like to hear the presentations firsthand.

2013: The session featured innovators from several fledgling organizations, including VeoMed (Thomas Chandy), whose activities included delivering continuing medical education more efficiently, Slicebooks (Brian Erwin), which operates a platform for slicing, remixing and customizing eBooks, and the Edanz Group (Benjamin Shaw), which does such things as making videos in which editors of journals discuss their Aims and Scopes to facilitate author submissions.

2014: I heard presentations by Marcia Allan, BioTech Solutions Enterprise Group, about the clever ways her company gets researchers to use gamification for content aggregation, and Steven Toole, Content Analyst Company, about the heavy usage of semantic tools by the legal and intelligence communities.

2015: The session on innovation presented a group of clever products and services, including a user engagement and advertising platform for mobile devices (tapCLIQ), a bookstore for free eBooks that are already freely licensed (Unglue.it), a service that helps funding organizations make sure they’re not about to fund research that other organizations are already funding (UberResearch) and a platform that enables students to study for standardized exams with a management system that primarily uses text messages from tutors (PrepPercue). (Data show that 98% of text messages are actually read — not, one hopes, while student recipients of the texts are driving.)

2016: Start-up founders Carol Barash (Story2), Dmitry Green (Arximedex), Tim Lloyd (LibLynx) and Karen McCord (Breezio) unveiled their respective new companies to 100+ attendees. Story2 builds on the “Moments Method” and makes it scalable to the classroom. An online writing platform, Story2 helps to “tell the stories only you can tell in the way only you can tell them.” Few of us would disagree with Green’s statement that there is “the need to curate the sea of literature.” Arximedes augments traditional peer review by being a repository of community ratings for “sleeping beauties” (papers with no citations at first then BOOM! they are discovered). LibLynx offers a cloud-native service based on IAM (Identity & Access Management) with an API-centric design. Lloyd claims his system delivers agility to publishers in the sense that its functionality allows them to make small bets without great cost which can be quickly turned off if the product or service idea doesn’t work. McCords’ product, Breezio, is an engine that answers questions in an asynchronous way while searching and reading individual results.

2017: Kent Anderson, a veteran medical publisher and former mystery novelist (“I did three and I’m done,” he told me), talked about Redlink, which helps academic publishers, editors, readers, users and libraries employ data to streamline their collaborations, and Redlink Network, a public benefit company, which allows publishers and librarians to connect and collaborate to resolve access and support issues with a community-driven offering. Prof. Peter Burnhill (University of Edinburgh) talked about several groups he’s involved with that are dedicated to preserving the scholarly record, such as preventing “reference rot,” which can occur when web references are lost or content “drifts.” In those cases, you freeze content with note-taking software. As illustrations, Prof. Burnhill used pictures of fish in various stages of decomposition. Doctor Paul Kudlow (on leave from his residency and working toward a PhD in bibliometrics and content discovery) talked about TrendMD, which deals with information overload and works to drive serendipity by annotating published articles with Netflix-style recommendations. The company has now gone beyond medical content. Daniel Whaley demoed the capabilities of Hypothes.is, an annotation trail provider that is intended to replace ubiquitous comments widgets, which don’t work effectively because a comment is not placed next to the content being commented on. He annotated an Open Access law journal article, then went to the linked Congressional bill, where he inserted more annotations. There was some discussion during the Q&A as to whether he’d defaced the archived text of the bill. I found the session entertaining.

All of Darrell Gunter’s innovation sessions were not only informative, but also entertaining. They were a great way to end PSP annual conferences and will be missed.
Collection Management Matters — BFF: Collaborative Partnerships of Collection Management and Systems Librarians

by Xuemei Ge (Systems/Metadata Librarian, Tennessee State University) <xge@tnstate.edu>

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Collection Management Librarians and Systems Librarians work together to provide much of the technological functionality required for innovation and enhancement. Most often, the projects that Collection Management needs to make operational are facilitated with the expertise that comes from the Systems. Collection Management projects and initiatives are supported by the Systems Department. The two departments have an ongoing partnership to bring about change in resources and delivery of services to the library’s clientele. One cannot advance the mission of the library to provide resources to support the curriculum without the other, therefore they need Best Friends Forever (BFF).

As the Systems and Metadata Librarian at the Brown-Daniel Library at Tennessee State University, an urban HBCU in Nashville, I supervise the implementation, operation, integration, enhancement, and customization/configuration of Innovative Interfaces’ (Siierra) ILS and its applications. This includes introducing new software releases and improvements, revision of work procedures, and training the library staff. I am the first person to call on to update system settings and tables, to resolve ILS performance issues, and to consult about implementation and utilization of system upgrades and advanced features. When off campus patrons have issues with access to the databases or ejournals, I debug and repair the URLs, as well as troubleshoot database errors reported by the library staff and patrons. My department of one manages the Electronic Resources Management (ERM) coverage loads and MARC records for e-journals, eBooks, streaming videos, sound recordings, and electronic theses and dissertations. Other assignments include database clean up with the goal of insuring the integration and web accessibility of all library electronic resources and coordinating assessment and statistical reporting on system operations for circulation, collections, and other requirements.

In collaboration with the Assistant Director for Collection Management, I completed various implementations, hardware upgrades, and enhancements for better user experiences and services. We worked together to implement the library’s discovery layers, first Encore, and now EBSCO EDS. We also teamed up on transferring our A-Z list of journals available in databases from Serials Solutions (360 Core and 360 MARC Updates) to EBSCO A-Z and their MARC records service. Teamwork is needed for making sure the coverage load is functioning properly. After many failed attempts to link Google Scholar with our link resolver, I linked Google Scholar with EBSCO’s Publication Finder and provided our library patron a one-stop shop for articles.

When troubleshooting is needed to resolve electronic resources access problems, the Systems Librarian will work closely with vendor technical support and university IT Department to resolve technical and performance issues for cataloging, acquisitions, and serials. I catalog databases and websites that are selected by the Acquisitions and Serials department and have a presence on the admin accounts for EBSCO, ProQuest, Elsevier and other database vendors to help resolve problems.

My job plays a pivotal role in bringing new products to the library that enhance and support the delivery of services ordered by Acquisitions and Serials Department such as Get It Now and BrowZine. I also set up and troubleshoot the vendors for our FTP ordering and receiving of invoices from Sierra. The Acquisitions and Serials department used to count serials check-ins manually, but I came to their aid by creating a way to count the monthly check-in for journals, newspapers and newsletters, and standing orders by using the “Create List” feature in Millennium. Another innovation was creating a New Books Lists for the library’s homepage, which announces monthly additions to the Sierra catalog, providing the university community with notification of the most-recent content added to our collection.

The New Books List categories were recently revised and expanded to align with academic majors, instead of just broad subjects. To promote Tennessee State University authors and faculty research, my department implemented the “Digital Bookplate” which places a permanent link in the OPAC record with biographical information about the TSU author. Along with the bookplates, I maintain the “Spotlights on Tennessee State University Authors” web page. Another area of collaboration is inventory projects which require that Circulation, Collection Management and Systems work together and make procedural decisions for the former inventory software Circa and now for the new tool, Mobile Worklists. I drafted the inventory procedures that we intend to use with Mobile Worklists. The inventory enriches and improves the quality of the database, and provides the library with more accurate records of the library holdings in the online catalog for our users.

The library’s digital research repository, Digital Scholarship@Tennessee State University, is one of my major responsibilities and I am working with Collection Management and Special Collections to transfer much of our digitized university archives, such as yearbooks and commencement programs. The repository provides opportunities for departmental, college/school and university publications, including the University’s journals. I coordinated and finished the set-up, design and customization of the repository, which included producing three electronic journal structures: The Journal of Tennessee State University, Sketches: The Online Creative Arts Journal of Tennessee State University and Annals of Management Science. I manage and upload the content for the four divisions of information in the Digital Scholarship: electronic theses and dissertations of the university, research papers for the faculty and students for different departments and units, all available issues for these electronic journals, and university archives. So far, more than 2,000 items have been uploaded into the repository. The editors of Sketches: The Online Creative Arts Journal of Tennessee State University are planning to bring in more artwork and video and/or audio recordings of spoken-word performances in a multimedia format.

When university programs undergo reaffirmation for accreditation or academic program reviews, a representative from these areas, usually the Department Chair, customarily requests reports on the library holdings for their programs. I create reports on print, serial, media and electronic resources in their subject scholarship.

Over the years, in collaboration with the Assistant Director for the Collection Management, I have managed multiple software releases and hardware upgrades, and implementations. During the 2018/2019 fiscal year, the library went through four major migrations and significant technological changes that improved our delivery of services. We migrated from Innovative Interfaces’ (IIF) Encore discovery tool to EBSCO Discovery Service (EDS) a new discovery layer for our catalog which incorporated BrowZine, Full Text Finder, and our institutional repository into one interface, allowing direct linking to full text articles. It allows us to make our Research Guides, Institutional Repository, Government Documents and selected databases searchable for from one access point. Along
Biz of Digital — Transitioning to a New IR Platform

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Introduction
In August 2017, Elsevier purchased Digital Commons-bepress, motivating numerous institutions to explore and commit to options for leaving the popular institutional repository (IR) platform. The purchase took place soon after the Oregon Health & Science University (OHSU) Library decided to migrate from Digital Commons to a new IR platform. At the time the OHSU Library’s collections were primarily composed of electronic theses and dissertations, digitized historical materials, and one faculty supported journal of student work. We have about 10,000 items total in our collections and add about 200 additional items a year on average. Samvera, HP Trim, Alma Digital, Alfresco, and Extensis were all discussed as possible replacements for Digital Commons, however, Samvera was selected. Factors driving this decision, included requirements for displaying Historical Collections & Archives materials and a desire to invest in and contribute to an open source system. This article will describe several of the challenges the Library experienced during the process and the accompanying planning that occurred as a result of the move. Repository functions are a core function of the services the library offers to the OHSU community. Digital collections should serve as a showcase for the library’s expertise in preservation, discoverability, metadata quality, and attract new audiences to the work happening at OHSU.

Background
OHSU is Oregon’s only academic health center, and has 16,000 employees. OHSU is composed of the schools of Dentistry, Medicine, and Nursing. The College of Pharmacy is operated jointly with Oregon State University and the School of Public Health is shared by Portland State University. In fiscal year 2018, OHSU researchers raised $462 million. The Library plays a vital role in campus activities. Librarians consult on literature searches for students, faculty, and staff, provide advisory services to facilitate successful research data management and scholarly dissemination, and teach within and outside of the curriculum. Some of the learning and research activities taking place at OHSU are documented within our institutional repository. Recently documented research includes projects produced by the Interprofessional Care Access Network (I-CAN). This program is housed within the School of Nursing and brings together students from Nursing, Medicine, Dentistry, Public Health, and the College of Pharmacy to work as teams to help people from underserved communities access health care services. Project examples resulting from this program include, “Barriers to Obtaining a State Issued ID While Houseless in Portland” and “Intimate Partner Violence: A Bidirectional Relationship.” Additionally, in 2019, the Digital Scholarship and Repository Librarian presented to over 50 students in three different programs about contributing work to the IR.

The Library’s digital collections include 3,262 Electronic Theses and Dissertations (ETDs) and a range of digitized material from Historical Collections & Archives. However, the Library does not have a formal policy for digital collection development. This poses challenges for outreach, metadata planning, and technology development decisions. Currently, the outreach strategy is based on serendipity, established connections, or opportunities that arise from campus events and initiatives. With a detailed and vision-driven digital collections development policy, the OHSU Library will be able to create a targeted outreach strategy that reflects our institution’s goals for curating, disseminating, and preserving its work and research. The absence of a collection development policy also creates problems in terms of knowledge transfer. For example, the librarian who initially led the Library’s migration to Samvera left her position early in the process. The Library’s current Digital Scholarship and Repository Librarian joined after the process was underway.

The Transition
The Library’s transition from Digital Common to Samvera took place in the winter of 2018-19. First, we migrated the ETDs and then collections like Public Health in Oregon: Discovering Historical Data followed. While librarians learned about Samvera, ETDs were the most straightforward material to move. The systems librarian doing the programming to execute the move reported back to a cross-departmental Digital Collections Committee. Early in the process, some challenges of moving out of Digital Commons were addressed. For example, Digital Commons is specifically

continued on page 59
designated and has features to support journal publishing and, as noted above, the Library’s collections included a journal of student scholarship. Rather than investigating and implementing a new journal platform during the migration to Samvera, the Library’s Digital Collections Committee decided to implement a temporary solution for hosting the journal on our Drupal based website, resulting in some loss of functionality. Especially significant was the loss of document-level metrics like downloads and social media activity. These metrics add value to our repository and publishing services, and help the Digital Scholarship Library recruit new content for the Library’s collections and demonstrate the benefits of open scholarly communication. At OHSU, making Samvera fulfill that goal requires relationship building. One of the institutions in the Northwest Samvera User Group announced that they received grant funding to solve the absence of research metrics in Samvera, and when the code for creating metrics is developed, it will be shared with the full community.

Discussion about SOLR, a Java open source search platform, focused on what facets to hide and how they should be organized. We realized early in the process that our users (including individual authors and educational programs) wanted to display and navigate our collections in ways that our existing metadata strategy and the search/display functionality did not satisfy. SOLR indexes, understands the search terms a user selects, maps the search query to the documents, and ranks the returned results. Challenges in adding additional metadata fields also arose. Communication around providing for stakeholder needs and what they want from digital collections became essential.

Early in the transition process, the OHSU Library realized they were not running the newest version of Samvera. The newer version will include an International Image Interoperability Framework (IIIF) viewer for images that will enable advanced image interactivity for users. The OHSU Library was not able to perform that update in-house and contracted with San Diego based Notch8 to do that work.

Keeping track of new development tasks and maintenance issues became increasingly important during the transition. At first, we used a spreadsheet shared via Box to list these tasks, but this was not an effective way of monitoring tasks that needed to be accomplished, because it didn’t generate active reminders. We looked for another option and then we transferred to using our in-house ticketing system that pinged our programmer and seamlessly kept track of the development of an issue. This proved to be much more effective.

**Strategic Planning**

In July 2019, the library conducted a strategic planning session related to digital collections. The session began by focusing on the audiences and core functions for digital collections. Openly disseminating OHSU research in the most user-friendly way possible emerged as a vital goal. Digital collections at other institutions were reviewed, a SWOT analysis was conducted, and opportunities for collaboration with other institutions were discussed. The planning session highlighted that digital collections are an important way that academic research libraries distinguish themselves from other types of libraries. Short- and long-term goals were identified at the planning session. In the coming year, the Digital Scholarship and Repository Librarian and other staff engaged with digital collections will work on improving metadata so that users can access items more effectively.

As of October 2019, the upgrade to the newest version of Samvera is underway review by OHSU librarians. Conversations are also ongoing to determine the upgrade to the repository need to occur in FY2021.

**Conclusions**

A collection development plan would enable us to anticipate metadata needs and work within the community to create a user-focused metadata strategy. We are currently in the process of developing the plan. Repositories provide access to exciting research and work generated within universities. An open source product can be dynamic and rewarding, but it requires ample local programming knowledge and a strong spirit of collaboration. 🐘
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n all the years that I have interacted with libraries and librarians, the one constant has been and always continues to be the “relationship” between the vendor and the information professional. I recently came across a chapter in a book written by Ronald A. Gagnon. It is titled “Library/Vendor Relationships from a Public Library Perspective.” He states, “Relationships are critical to the success of all library projects. While relationships with constituents and funding authorities are easy to understand and important to address, the role of a library’s relationship with its vendors should not be underestimated.” Although this was written in 2006, Mr. Gagnon’s observation is still very relevant today and will continue to be as long as vendors call on libraries.

When my father came to this country from war torn Europe in 1939, he got a job as a salesperson. Relocating to a new country at his age prompted him to take whatever employment that was available at the time. At first, he worked for a furrier, but over the ensuing years, he held a variety of sales positions in different industries.

Watching him do his job as a young boy, I was fascinated with the process of his selling and interacting with customers and prospects as he did on the phone. Although he travelled to see customers and prospects, much of his work was done over the phone. He had a home/office so he did a considerable amount of work from home which allowed me to occasionally listen in to those conversations. Sometimes, when he wasn’t home, I took messages from customers for him. I felt quite important doing that role for him. His demeanor on the phone was always the same. He developed strong business relationships with his clients.

Sometimes, he attended trade shows. I remember that a few times he took me for a day or two with him to the trade shows as long as attendance at those shows did not interfere with my schooling. I remember being overwhelmed in cities like Boston and Philadelphia where I had never been before. I will always be grateful to him and my mom for giving me the opportunity to travel and learn about other locations than just the block in Queens, NY where I lived.

One day, I asked him about this mystical world of sales that he seemingly operated so effortlessly through. I was no more than 12 years old at the time and I will never forget what he said to me. He said, “Mike you need to understand that the secret to successful sales is in the relationship. I don’t care if you are selling pencils or Cadillacs. If people like and trust you, they will buy from you and success will be yours.”

Yikes! You mean if they like me, I’ll be successful? He smiled knowingly, as only a parent can do and said it’s not as easy as you may think. He suggested that a career in sales would be a tough business for me and that perhaps I might try a profession that was less risky. As it turns out, some twenty years later after that conversation, I began a sales career that lasted 40 years. In all that time, my father’s words were always in the back of my mind. If they like you, they’ll buy from you. Hmm... Ironically, my first boss believed in that premise which probably explains the success that the two of us had.

Quite frankly, when I began my sales career, success was not immediately forthcoming. The first year was pretty rough. My first major sales breakthrough came in November of that first year, ten months after I started. I was lucky to have a boss who was very supportive of my efforts and owners of the company who supported every idea that we both devised to bring more sales through the door.

As is the case in any business, there are no shortcuts to success. Hard work, attention to details and a willingness to listen to the customer are all aspects of a successful sales organization. We used to say, “The customer is always right; and if they are not right, we need to work to make them right.” That’s a tough concept, especially with all the Type A personalities that make up the majority of sales organizations through-the world. Sometimes, making the other person right, translates to making oneself less than correct. Maybe that concept is fine in our personal lives but not in the vendor/customer relationship. Each side has to feel that the relationship is beneficial for both. Making the other person wrong just to make yourself right is not a way to sow the seeds of success.

The customer has to feel confidence and trust in the salesperson. That trust develops over many years of conversations, visits and fair negotiations. It takes years to develop that mutual trust.

I am concerned to see that many information industry companies today seem to turn over their sales staffs with great frequency. While I understand the need to constantly improve the quality of the people representing the company, time needs to be invested in training and coaching to help the employees to succeed. One of the major complaints that I hear from my library friends in assessing the quality of the salespeople who call on them today is that there always seems to be a new rep every year. How can you develop a relationship with someone if there is a new person every year?

So what can vendors do to ensure that their sales reps are operating at the highest level in creating strong relationships that will ultimately result in more sales for the company and ensure customer satisfaction?

- **Know Your Market** — If you are selling products to government, corporate and academic libraries, understand that each market is different with their own set of challenges. In today’s complex world of information dissemination of varied databases, don’t expect your reps to be successful with the “one size fits all” solution. Market specialists, who understand the “ins” and “outs” of their particular markets, are worth the investment. A successful sales rep selling in the corporate space probably will not have the same success selling in the academic arena.

- **Training** — Like any profession, library sales professionals need to be made aware of industry changes and new challenges arising from competitors. Take the reps out of the field for a few days a couple of times a year and refresh their skills and attitudes. The way to “Know Your Market” is to create “Training’’ programs to help them understand the power of strong relationships with the customer.

- **Interaction** — Customers and prospects are literally deluged every day with calls from salespeople wanting to sell them something. Some reps are cleverer than others in reaching the proper person at the library, but the bottom line is that you can’t sell anything unless the rep is in front of the right person. A way to ensure that this happens is to have a member of senior management accompany the sales rep on certain meetings. Bringing along a VP or even the President of the company shows the customer how important they are. How powerful is it to say, “At our next meeting, I’d like to bring along our SVP of Operations to meet you. She would like to share some ideas with you to better serve you and is interested in hearing how you feel we are performing in delivering timely data to you.” That may prompt the customer to bring someone from their organization on the same level which will elevate the meeting to a more dynamic one. A VP or President or CEO in attendance at one of my sales meetings was always met with great respect because it showed the customer how important they were to me and the company. It all helps to build the bond.

- **Advisory Boards** — A one-on-one meeting is good and it certainly has its place, but if you can fill a room with clients
Marketing Touchpoints — Segmenting User Groups for Greater Inclusivity

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ver the years as I’ve given workshops and talks about marketing, I’ve found there are some marketing concepts that just don’t immediately resonate with my colleagues in libraries and related organizations. Rightfully, many library professionals are skeptical of applying for-profit ideas to non-profit goals that seek to advance the greater good. I applaud and encourage those folks for bringing a selective, critical perspective to borrowing from business theory and practice. I’m also of the belief that we should selectively adapt marketing methods as they make sense to benefit our users, rather than adopting marketing ideas wholesale for the sake of being more “business-like” (which isn’t inherently better). However, in some cases, valuable marketing ideas get sidelined not because they’re inappropriate, but because they’re misunderstood. One such marketing idea in particular never fails to stimulate debate and resistance among librarians — segmentation.

Segmentation is a widely-used marketing approach that involves analyzing and breaking up the group of all potential users an organization might serve into smaller groups based on how likely those users are to respond to particular offerings. The general idea is that you can’t serve everyone equally well with generic offerings, and by selectively targeting and tailoring products and services to distinct groups, you improve the chances that members of those groups will respond positively.

Intuitively, most of us recognize this principle as a fact of life in a commercial world. Our mobile devices and digital behaviors, for examples, give companies troves of information to present us with precisely personalized offers and ads based on profile data we provide, geographic location, social media likes, our purchase history, and so on. For many of us, customization — sometimes helpful, sometimes creepy, and often in-between — is a firmly entrenched expectation.

In general, this concept has great appeal to many businesses, and similarly great potential to benefit users. Businesses, for their part, can dedicate limited resources to focusing on understanding and serving the needs of customers they are best-equipped to help with products and services that provide a precise solution to customers’ problems. Ideally, in doing so they maximize their resources’ potential and end-user impact while avoiding the waste that results from targeting groups they can’t serve sufficiently. Customers too can benefit from segmented approaches, as the target customers should receive more relevant offerings and communications that are more likely than generic ones to offer meaningful solutions, while reducing the time it takes them to cut through clutter to find suitable marketplace options.

While librarians may concede these benefits in a commercial sense, it’s easy to see where the segmentation concept falls apart in an applied non-profit context. We librarians serve everyone, after all. It’s anathema to preferentially select one user group over another as it’s the antithesis of our core values of inclusion, diversity, and equity. If you believe this, how could segmentation ever be applied ethically and effectively in libraries? Should it even be considered?

My answer to those questions is an emphatic, “Yes!” It’s absolutely true that segmentation done poorly can alienate, exclude, and harm users. But done well, segmentation can be a go-to means of ensuring our institutions’ efforts make positive differences in people’s lives and actually further inclusiveness.

Accidental Segmentation Can Lead to Harm

We librarians segment all the time. While mission statements typically assert that we serve all, our practices differ by necessity. If, for example, you work in an academic library, you welcome users from all over the world, but your day-to-day work is most likely devoted to the faculty, students, and administrators affiliated with your institution. You wouldn’t turn away the casual community researcher of course, and you may also create some services for these folks, but the bulk of your teaching, acquisitions, outreach, and collection management efforts almost certainly aim to advance the research and teaching activities of your college or university. Within those affiliated user bases, you also probably subdivide users by characteristics like discipline, rank, locality (on-campus vs. remote), etc.

Left unexamined, these organic segmentation activities can perpetuate inequalities and exclude underserved groups. Take for example the growing movement to apply a social justice lens to our services and acquisitions practices. As a Library Journal article on the topic states:

Historically, libraries have shown a low tolerance for risk and a strong tendency to allocate limited resources of time, money, and energy in areas that yield the greatest results (or, at least, the highest numbers in areas that are easy to measure) and perhaps the least potential for problems. Some libraries of all types, however, are reevaluating the role they play in their community, questioning whether it is still good enough to provide equal access, or if it is time to pursue an active equitable access that focuses on empowering the less powerful and amplifying the voices of the unheard.¹

In other words, librarians’ relatively mass-market approach to serving users is being reassessed by some who find such an approach reaffirms endemic social power structures. The remedy proposed here is to selectively examine the perspectives of underprivileged groups to bring greater visibility to their voices and viewpoints via library collections and services. A segmentation approach, in this case, can be wielded to serve the underserved.

continued on page 62

Both Sides Now ... from page 60

and/or prospects and get those people to comment on the strengths and weaknesses of your company, then you’ve got the makings of building a strong relationship within your marketplace.

Relationships between vendors and customers are built over many years. The rock group, Canned Heat, accomplished a gold record award for their hit “Let’s Work Together” which is a fitting postscript to this article. 🎵

Mike is currently the Managing Partner of Gruenberg Consulting, LLC, a firm he founded in January 2012 after a successful career as a senior sales executive in the information industry. His firm is devoted to provide clients with sales staff analysis, market research, executive coaching, trade show preparedness, product placement and best practices advice for improving negotiation skills for librarians and salespeople. His book, “Buying and Selling Information: A Guide for Information Professionals and Salespeople to Build Mutual Success” has become the definitive book on negotiation skills and is available on Amazon, Information Today in print and eBook, Amazon Kindle, B&N Nook, Kobo, Apple iBooks, OverDrive, 3M Cloud Library, Gale (GVRL), MyiLibrary, ebrary, EBSCO, Blio, and Chegg. www.gruenbergconsulting.com

Against the Grain / December 2019 - January 2020 <http://www.against-the-grain.com> 61
Knowing Users is a Prerequisite for Helping Them

It shouldn’t be surprising that in order to segment a large user base into subgroups based on users’ behaviors, attitudes, and characteristics, you have to know something about those behaviors, attitudes, and characteristics. Successful segmentation is predicated on an in-depth understanding of users so that you can create truly relevant, effective services that sensitively address users’ needs. You can’t do that without expending some concerted effort learning about users’ perspectives, and in particular how their perspectives could influence how they respond to service offerings.

An article in the Journal of Consumer Marketing underscores this imperative. In the article, author Edith F. Davidson explores the unintended consequences of race-based segmentation strategies, noting that perceived discrimination is a significant issue for minorities in business settings. Davidson states, “As the marketplace becomes increasingly more diverse, it becomes important for marketers to know and understand each customer group they serve. This includes knowing how groups differ in their perceptions, motivations, and interests.” Given this, segmentation is essentially an opportunity to get to know your users better.

As you start to tackle user research, where should you begin? There’s more than one way to slice an onion, so to speak, and a rich array of segmentation variables to consider. Some common bases of segmentation include:

- Demographics (geographic location, age, income, ethnicity, gender identity…)
- Behaviors (frequency of visits/checkouts, in-person vs. online use…)
- Benefits sought (help with assignments, quiet/productive place to work…)
- Attitudes, interests, and opinions

As you discover groups of folks with similar characteristics that you might serve collectively, you should consider which segments make sense for your organization to target and are likely to have the greatest positive impact. The characteristics of what makes one segment better than another are well-documented in marketing literature. Though you can’t do that without expending some concerted effort learning about users’ perspectives, and in particular how their perspectives could influence how they respond to service offerings.

As you start to tackle user research, where should you begin? There’s more than one way to slice an onion, so to speak, and a rich array of segmentation variables to consider. Some common bases of segmentation include:

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As you discover groups of folks with similar characteristics that you might serve collectively, you should consider which segments make sense for your organization to target and are likely to have the greatest positive impact. The characteristics of what makes one segment better than another are well-documented in marketing literature. Though you may not have the resources to do the data crunching to parse all of these possible segments the way large businesses might, the guidelines about viable segments are nevertheless useful guideposts as you explore where you might target first-generation college students with services that bridge gaps in understanding academia for those whose are charting new territory within their families. You may devise specialized instruction for these students about the role of libraries and research in higher ed, which could easily translate to other groups such as international students, transfer students, and generally inexperienced academic researchers. By studying the scoped needs of first-generation students, you may uncover insights that help identify and serve a broader segment (those new to using academic libraries in the United States). Segmentation need not imply exclusiveness, but rather, an approach to greater understanding, and subsequently, inclusivity.

Concluding Thoughts

In an article about the ethics of segmentation in health-related social marketing contexts (one that shares similar ethical concerns with library contexts), authors Newton, Turk, and Ewing examined pertinent ethical frameworks examined, they found a promising one for moving these ethical considerations forward called Theory of Just Health Care (TJHC). Its proponent offered four conditions whereby healthcare segmentation could be applied justly:

1. Segments and accompanying arguments underpinning segmentation decisions should be publicly disseminated.
2. Criteria used for segmentation should be deemed relevant by stakeholders.
3. An appeals process should be available to revise segments as needed.
4. These conditions should be regulated through voluntary agreements or legislation.

While I’m not advocating we necessarily adopt these criteria, I agree in principle that segmentation can be an exceptional opportunity to openly and critically evaluate who your services are reaching and identify sources of potential bias or oversight. The very act of articulating the needs and people your services are supposed to serve and exposing those decisions to review and feedback can help us all do better for our users.

Librarians are right to critically evaluate the intent and applicability of marketing concepts to library concerns. It is no doubt true that segmentation can be wielded for both good and ill. More questionable than applying segmentation is to continue doing so unconsciously.

Achieve Greater Good with Smaller Focus

As you may have gleaned, the term “segmentation” is a bit of a misnomer. To segment means to divide, and it’s true that segmentation requires one to examine a large user group in parts. Doing so, however, does not mean you should lose sight of the whole and sacrifice big-picture goals to satisfy a variety of subgroups.

Take for example the principle of universal design. As defined by the Centre for Excellence in Universal Design, it is “the design and composition of an environment so that it can be accessed, understood and used to the greatest extent possible by all people regardless of their age, size, ability or disability.” For those interested in accessibility issues, we understand that by making an environment more usable for those with physical and intellectual challenges, we simultaneously make the environment more accessible for many other groups who may or may not have the same challenges. A classic example in this regard is the curb cutout. Designed so that people in wheelchairs can cross the street without being stymied by a raised curb, curb cutouts also help people pushing strollers or luggage, and generally mitigate an unnecessary barrier for all. However, creating this innovation demanded empathy and a focused understanding about the particular challenges physically disabled people encounter.

Similarly, we can view segmentation as a way to narrow our scope to elicit insights that can result in large-scale improvements. To use a library example, consider how you might target first-generation college students with services that bridge gaps in understanding academia for those whose are charting new territory within their families. You may devise specialized instruction for these students about the role of libraries and research in higher ed, which could easily translate to other groups such as international students, transfer students, and generally inexperienced academic researchers. By studying the scoped needs of first-generation students, you may uncover insights that help identify and serve a broader segment (those new to using academic libraries in the United States). Segmentation need not imply exclusiveness, but rather, an approach to greater understanding, and subsequently, inclusivity.

Endnotes

I峨 Global’s Annual Academic Librarian Sponsorship Program Winner Shares Insights on Open Access, ROI, and the 2019 Charleston Conference

by Ms. Brittany Haynes (Editorial Assistant, IGI Global) <bhaynes@igi-global.com>

Featuring Ms. Elyssa M. Gould (Head of the Acquisitions and Continuing Resource Department at the University of Tennessee, Knoxville, USA) <egould1@utk.edu>

Column Editors: Ms. Caroline J. Campbell (Marketing Manager, IGI Global) <ccampbell@igi-global.com>

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Column Editors’ Note: This column features Ms. Elyssa M. Gould, Head of the Acquisitions and Continuing Resource Department at the University of Tennessee, Knoxville, USA, who was the winner of IGI Global’s annual Librarian Sponsorship Program, which provided a travel stipend for the 2019 Charleston Conference.

To learn more about Ms. Gould’s experience at the 2019 Charleston Conference and her view on the trending topics of discussion at the conference, read the interview below. — CC & LW

What do you do in your current position at the University of Tennessee?

I currently coordinate and lead 16 staff who perform acquisitions, electronic resource management, licensing, binding, and interlibrary loan activities at the University of Tennessee, Knoxville, USA. Additionally, I have previously served as Electronic Resources & Serials Librarian at the University of Michigan Law Library, USA, and Cataloging & Metadata Librarian at Northern Michigan University, USA.

What was your experience like at the 2019 Charleston Conference?

I had a good conference! It was my second time at the Charleston Conference, and it was my first as a presenter. I presented on two panels, “I Don’t Want to Go Among Made People: Adventures in Establishing Good Communication Between Subject Librarians and Technical Service Departments in a Large Academic Library” and “Begin at the Beginning: Revamping Collection Development Workflows,” in conjunction with my colleague Ms. Jennifer Mezick, Collections Strategist, from the University of Tennessee, USA. Both panels outlined practices, workflow enhancements, and lessons that we learned at the University of Tennessee when we were both put into leadership positions.

Additionally, during the conference, I felt like I got a good mix of vendor conversations, conversations with peers, and ideas from interesting presentations. I was honored to receive the IGI Global Librarian Sponsorship award, as the Charleston Conference is a wonderful conference that prioritizes librarians and vendors working together to achieve mutual goals. Sharing in conversation with vendors is the first step towards a mutually beneficial partnership.

In your opinion, what were the most relevant topics that were discussed during the conference?

I think the most relevant topics were around scholarly communications, publishing, and open access. I really appreciated presentations by practitioners showing what their institutions were doing to respond to both open access and budget constraints. What I saw was that no two institutions were alike; what one institution values most may be of lower value at another institution. It was encouraging that a response can look so different but still be working towards an overall goal of making research accessible to patrons.

What can librarians do to ensure that they are maximizing the ROI on their content investment?

Librarians should spend the time to go through data provided by the vendor, talk to the patrons who use the content, and incorporate other measures such as e-resource troubleshooting data. Through creating a holistic view of what content is being used, needed, as well as published, librarians can ensure that they are making the most informed decision, while even identifying areas of opportunity or improvement.

As the open access movement was a prominent topic discussed at the Charleston Conference, what are the benefits of open access, and how can publishers better support academic libraries and their patrons in OA?

The open access movement provides a more transparent way for libraries and publishers to support research. The additional benefit — of being able to make more content open access — fulfills library missions. To improve their open access models, publishers should talk openly with libraries before making decisions on how to improve existing models to ensure that it is directly benefiting their customers and the academic community at large.

In relation to this question, I think IGI Global’s open access offset model, the Open Access Fee Waiver (Read and Publish) Initiative, is a really good start and rightly acknowledges a library’s subscription or purchase as supporting research.

What challenges do librarians face in integrating these models and conforming to the OA movement?

Coming from a technical services background, the more slightly different models we have, the more difficult it is to keep track of them and fully maximize each model. If we cannot keep track of them, researchers definitely will not be able to keep track of them. I do not think one model will fit all, but I anticipate a wider adoption rate by researchers if there are only a few options to keep track of, instead of many.

As a librarian, what are the things you most want publishers to understand about your acquisition needs?

We are being asked to do more with less funding, but the reality is really that we are doing less with less funding. It is time to stop squeezing libraries for funds. Instead, publishers need to look into new and additional partnerships that can offset publishing costs while still providing patrons with access to research needed for teaching and learning.

IGI Global would like to congratulate Ms. Gould on this award, as well as her work in advancing the state of knowledge resources. Additionally, as a diamond sponsor of this conference for over 11 years, IGI Global would like to thank everyone who was involved in this year’s successful conference.

Column Editor’s End Note: To learn more about how librarians can maximize their ROI and about IGI Global’s transformative OA Fee Waiver Initiative noted in the above interview, watch the Charleston Conference panel, “Twelve Danishes for the Price of One: The Benefits of Bulk Acquisitions for Libraries;” here: https://bit.ly/36snDZe.

During this panel session, attendees heard viewpoints from a librarian, publisher, and
aggregators on the benefits of bulk acquisitions compared to the title-by-title approach and ways these parties can come together to create innovative solutions for achieving a maximized ROI for libraries while also catering to the academic community by providing access to trusted, peer-reviewed research. Speakers on this panel included:

Moderator: Mr. Scott Ahlberg, Chief Operations Officer, Reprints Desk
Mr. Nick Newcomer, Senior Director of Sales and Marketing, IGI Global
Mr. John Elwell, MLS/MA, Director of Content Strategies at EBSCO Books
Mr. Scott Pope, MLS, Continuing Resources Librarian at Texas State University
Ms. Sara Tarpley, Director of Academic Product Sales at Gale-Cengage Learning

Additionally, in order to stay abreast of the opportunity to apply to next year’s Academic Librarian Sponsorship Program, which provides a $500 travel stipend to attend the 2020 Charleston Conference, sign up to our mailing list at www.igi-global.com/newsletters/

Recommended Readings


Endnotes
1. About IGI Global’s OA Fee Waiver (Read and Publish) Initiative: For any library that invests in IGI Global’s InfoSci-Books (5,300+ eBooks) and InfoSci-Journals (185+ e-journals) databases, IGI Global will match the library’s investment with a fund of equal value to go toward subsidizing the open access article processing charges (APCs) for their patrons when their work is submitted and accepted (following the peer review) into an IGI Global journal.

Rumors from page 59
Dec 19-Jan 2020 (p. 53) is her last one. But in typical organized fashion, Lolly has recruited her replacement, Will Cross from NC State wmcross@ncsu.edu who was one of Lolly’s favorite students! And Will has already turned in his February 2020 column. We will miss you, Lolly! Please keep in touch! xoxo

January is almost over! Happy New Year! We continue to clear things up after the 2019 Charleston Conference as we prepare for 2020. Just got a slew of pictures from Reese Moore who took fabulous pictures during the 2019 Charleston Conference! I first met Reese when she was taking pictures for College of Charleston publications. She has branched out on her own! Browse through these and see some familiar faces! https://www.reesemoorephotography.com/blog/charleston-library-conference-photography

I have been reading Peter Brantley’s (UC Davis) read201-owner@mailman.panix.com as much as I can. Whew! A lot to take in! And a lot of “must see.”


Hard to believe another year has passed! May it be the best ever! Love, Yr. Ed.
Students entering the library classroom showed immediate signs of confusion. The classroom lights were low, and a steady, mechanical hum was barely audible. Taking their seats, they noticed a projected screen at either end of the classroom. The screen at the front of the classroom stated “Nuclear reactor meltdown scenario,” and below, glowing letters were arranged in a semicircle base. Each tube had a glowing section at the bottom and a small red blinking light emanating from the top.

One student turned to her classmate and asked if she was in the right classroom. “This was the library class, right?” Other students nodded with looks of uncertainty.

Then the librarian instructor entered the room wearing a lab coat and a worried expression. “Comrades,” he announced in a tone that matched his concerned expressions, “I have grave news. Our nuclear plant that supplies power to our facility has gone into meltdown. Let me draw your attention to the temperature gauge.” All heads turned to a graphic image of a large round thermometer on the rear screen. The needle hovered at 415 degrees.

The temperature gauge increased. Time was running out. If the temperature increased further, it would go from red to yellow, and eventually to orange, indicating the CORE meltdown. Apparently, these were the melting fuel rods, or glowing tube things in the middle of the room. Apparently, they were still doing this. This was now a competition—a race to the CORE!

Warnings buzzed and lights flashed as the temperature gauge increased. Time was running out, and the teams had been slowed down by the necessity of interpreting clues generated by several printed out articles—a actual print articles. They had been directed to an actual (i.e. real, analog) locked box in which they had found them. Solving this puzzle would give them the code to the main CORE control room. But, there were murmurs of discontent. “Like, who does printed articles these days?!”

Team three solved the puzzle that opened an animated door. The students literally screamed in excitement that quickly died as they realized what they had. The opening door revealed a cipher and a clue for shutting down each of the glowing tube things in the middle of the room. This was now a competition—a race to the CORE!

The claxon began to sound and red lights began to flash as the other teams broke into the control room and converged on the middle table to coordinate their data. The temperature gauge was approaching critical. Team two solved their section of the code and typed it in. A fuel rod powered down with an audible descending groan. The red light on the rod stopped flashing and went green. Less than two minutes remained. Team one typed in their code. A claxon ceased, and the green light flashed on a second tube. As the last seconds ticked away, team three solved their puzzle and fumbled to type in the final code. But, alas. . . .

The temperature gauge clicked into critical mass and the final warning buzzer sounded. An image of an expanding cloud of steam and radioactive ash appeared on both screens with the audio of an increasing roar. All members of our nuclear teams disappeared in the swirling, burning mass. The lights went out.

For a moment there was dead silence. Then a student pipped up, “That database thing was kind of cool. Can we do it again?”

Thus, learning was had with nary an observation of drying paint.
“Why is Nonai still having meetings if he’s retired?” That’s Josie, the 14 year old granddaughter, downstairs talking to Lynn. I’m in my study getting ready for another Zoom call. Despite being retired I’m still involved with a few scholcom projects and there’s a meeting for one or another of them every week or so. I’m in my comfy chair with a fresh cup of coffee. I do a quick check of the lights to make sure the lamp isn’t reflecting too brightly off my bald head.

Zoom’s the platform of choice these days, at least among the people that I’m working with. It’s efficient, easy to learn, has enough features to make managing a meeting easy. I’ve gone through several different platforms in the years since “teleconferencing” came to mean something more than straining to listen to a disembodied voice or two coming through a speakerphone in the middle of a conference table.

When videoconferencing systems first emerged, the hype was that they’d replace physical meetings. No more flying from one city to another, dealing with cabs and hotels and expensive conference food. Techno-hype is always like that. That’s why we no longer have movie theaters or radio or live orchestral performances or printed books. The new technologies have replaced all of those things. Right.

When the breathless predictions die down we start to sort out what the new technologies can do better and what the old ones still have the advantage of. History proceeds, as it always does, in a wobbling spiral, never in a straight line.

Despite the ease and efficiency of online meetings, nobody suggests anymore that in-person conferences are going away. As Alice Meadows pointed out recently, there seem to be more all the time.1 It turns out there is something irreplaceable about getting people together in person.

The Charleston Conference is a splendid example of that. Bigger every year, over-stuffed and unwieldy, tantalizing, energizing, and exhausting, it occupies a singular spot in the lives of thousands of the people who care deeply about the roles that librarians and publishers and the people working for the various vendors play. I had an excellent reason for missing the conference this year, but it’s the one professional meeting that I expect to keep attending. There are relationships that I’ve built there that have had an indelible impact on me, and it’s for maintaining those relationships and building new ones that it remains important to me, retirement notwithstanding.

The Medical Library Association’s annual conference held pride of place in my professional life for over twenty years, but it’s quite a different sort of affair. Health sciences librarianship comprises a wide array of settings and roles, but the MLA meeting is inevitably narrower in scope than Charleston. It’s a place for librarians to confer and consult and further relationships with others who are fundamentally like them, who share, to a considerable degree, a similar outlook. The vendors and publishers stay in the exhibit hall while the librarians sit in presentations and workshops and committee meetings populated entirely by other librarians.

At Charleston, by contrast, I’m often mingling with people who occupy very different roles in my professional world and have very different perspectives. In one of the first presentations I ever gave at Charleston I was bittingly critical of a policy on retracted publications that had been developed by Elsevier. The first person to raise his hand during the Q&A introduced himself and said, “I’m the person who wrote that policy.” We had a tense (and I’m sure quite entertaining) five minute exchange where I was forced to defend my criticism while he did more explanation of how the policy came to be, acknowledging that it was a work in progress.

That was Michael Mabe, who went on to lead the STM Association. He and I became friends and Michael opened many doors leading to other relationships with dedicated professionals who helped me broaden my vision. This wouldn’t have happened on a webinar.

Where relationship building at conferences has often occurred is the hotel lobby bar, but that illustrious tradition is fading. I was in Savannah recently to see some friends who were attending a regional conference. We were sitting in the bar after the welcome reception. There was a gaggle of librarians down at one end, but no other conference attendees in sight. One of us commented that in years past the place would’ve been full. People would’ve come out after the reception for one more over-priced drink with their friends and in the process been introduced to other folks they hadn’t known or known well and relationships would’ve been forged and furthered. I’d been noticing the same absences for the past few years. Where is everybody? Surely they’ve not all gone back to their rooms already. Someone astutely pointed out that in the age of social media it’s easy to find more interesting local watering holes and text a few friends to find places to meet up. Tweet out the location. The hotel bar isn’t required as a central gathering place anymore. That same perspective can also be seen in more hospitable surroundings with cheaper drinks.

There’s a similar phenomenon with my granddaughter who, like the majority of her classmates, is an extreme introvert and she, emphatically, is not. Her facility for maintaining relationships digitally is an extension of getting together with her friends in person. Even when she’s not with them, she’s with them.

When I started working in academic libraries thirty years ago, one of the most important relationships for many librarians was with their subscription agent. Librarians didn’t deal with many publishers directly. This was before the big deal and months-long haggling over licenses. The subscription agent was the critical intermediary. You built a long-term relationship with your local account rep and rightly believed they were working on your behalf. The publishers setting prices were shadowy background figures. You didn’t need to have relationships with them because you established a strong bond of trust with your rep.

The agents had to work just as hard at developing relationships with the publishers as they did with the librarians, but this web started breaking down with licensing and big journal packages. Elsevier insisted that librarians negotiate with them directly and other publishers followed. The agents scrambled, trying to take on the role of negotiators for their clients, but they were largely unsuccessful. The Association of Subscription Agents collapsed and many small firms, particularly European, folded. Those that remain can still provide an important service when the pricing of a publisher’s offerings is fairly static, but negotiating the big deals and packages that consume so much of the budget requires librarians and publishers to come face-to-face. And they have no history of relationships to build on. Nothing on which to establish trust. That mistrust between librarians and publishers damages the mission of libraries more than anything else I can think of.

My granddaughter knows that you can’t build trust relationships without contact IRL. She and her friends use their screens to extend their relationships. They can widen the circle. But the close relationships, the trusted relationships, are built in person. Trust is fragile. It can be broken online. It can’t be repaired there.

When Lynn was a VP with EBSCO, part of her job was to take people like me (a library director) out to dinner. She’d invited me several times when we were at the same conferences...
Emerging Tech: To Be or Not to Be? — Content Technologies

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Column Editors’ Note: This is the first in a series of articles about emerging trends in content technologies, with special focus on the scholarly publishing community and the companies that serve it. — DA & JC

In a series of articles, the authors will take a look at offerings up and down the supply chain and delivery spectrum to gain an understanding of new options available to accomplish old tasks, and some completely new ways of accomplishing tasks for which there hasn’t previously been the right technology. It is a relatively untechnical, high-level view of emerging solutions in the library and publishing markets for everything from content creation to the now-mentioned application of artificial intelligence and how libraries and publishers are using those solutions.

The overview of publishing technologies will be divided into pre-production, production, and post-production workflow groupings. These groups, of course, vary widely. The pre-production segment includes content creation, manuscript submission, peer review management, and collaboration and editing platforms; production includes digitization services, content management systems, and content enhancement for publication (whether digital or print); and post-production includes distribution, hosting, and enhancement platforms, services like identity/access, analytics and reporting, taxonomy and ontology, discovery, and more.

This topic is increasingly important as recent interviews with a number of mid-sized publishers revealed:

- All are making significant technological changes, either building new systems internally or working with vendors, or both;
- The majority are building internally because off-the-shelf solutions don’t fit every need, and in some cases don’t meet most needs without significant customization;
- None uses a single system to support all workflow functions, and the number of systems utilized continues to grow and become more difficult to manage;
- All are working on drafting development roadmaps but none has a clear vision as to where they want to be when system construction is complete, although many utilize agile development techniques, building as market demand changes;
- None are 100% satisfied with all vendors supporting workflow functions, primarily because their technologies are dated or limited;
- A driving factor for working with a specific vendor is not only functionality but customer service — relationships can drive many technology choices.

These findings point to a pressing issue facing most content providers today: avoiding technical debt. Because the cost of continually upgrading technology can be both operationally and financially daunting, content providers often go with relatively quick-and-easy solutions without addressing scalability or future needs. Parallel to that, technology/platform providers tend to build on existing platforms or modules in order to avoid investing significantly in R&D or a tech build offering new or more effective functionality.

Vendors utilizing more modern approaches to technology are likely to exhibit characteristics of those approaches with lower-cost, more efficient platforms, more user-facing interaction, and the oft-used term “flexibility.” This is not always the case, but the objective of technology is to build a better mousetrap and many emerging vendors — and a few stalwarts — essentially have done just that. (There are older companies, for example, that started off as typesetting and data conversion companies and now call themselves technology companies.) Some are utilizing more modern infrastructure and advancing in technology while others, like some platform providers, rely more on aging stacks.

While some older technologies have been able to extend their lives by including virtualization, which basically means they took their on-premise technology and modified it so it could play in the cloud — okay for some applications but not for others. What we refer to as “modern” technologies are usually cloud-based and driven by APIs (Application Program Interfaces), basically interoperability hooks enabling applications to talk and interact with each other. Older applications

Endnotes:
may tout APIs, but they are mainly used to push content and data — a virtual one-way street.

Modern applications are designed to be “cloud-native,” meaning they function in the cloud and take advantage of the benefits the cloud has to offer, which is not the case with their “virtualized” older cousin stacks. Characteristics include the ability to incorporate other applications seamlessly and having better recovery when they fall down (called failover or resiliency). They also scale up or down well (i.e., elasticity) so payment for servers is not based on a high-water mark as with older stacks. Many newer applications also operate on multi-tenancy, meaning they can gang applications running common processes without having to pay for additional seats.

More modern technology is also designed with the ability to add functionality or to be customized — the key difference being customization happens without much time or effort and doesn’t break ten other functions in the core application. This is because technologies are architected to have the characteristics users believe to be integral or basic — or maybe developers got tired of the endless lists of bug-fixes for older stacks. More modern approaches also tend to have workflow and management capabilities baked in so roles-based management and assignment of tasks are more easily enabled and are generally controlled by the client. This doesn’t mean adding training wheels or an ersatz steering wheel on a car seat, it means providing the ability to configure workflow tasks and functions that matter to a business in simple-to-use and easily-understood user interfaces (UIs).

So how do these applications work? Examples include: a collaborative work platform with a content management system (CMS) in the background enabling users to interact and collaborate with service providers or third parties (e.g., authors, editors); a means for users to customize and configure a team’s workspace in an admin and role-based workflow; the ability to have real-time review of actual progress rather than a disconnected progress dashboard that must be manually updated; and the ability to author/edit in a WYSIWYG interface that must be manually updated; and the ability to have real-time review of actual progress for every digital output.

- **API-based applications that handle business-critical functions publishers have trusted to be included in platforms or services.** The old approach includes many disparate technologies, platforms, and services. This is problematic as control typically tends to reside in inflexible platforms, making the “one ring to rule them all” approach smart business. This translates to moving control closer to publishers, not further away.

- **Ground-shifting technologies like node- or graph-based data logic.** At least two products we will look at in future columns have built applications around this type of data-handling logic. It enables rich contextual meaning and relationships, deep search and discovery, and much richer keyword and context searching. The difference between newer graph/node databases and older linear databases (which are more familiar, given the ubiquitous SQL) is the acceleration of smart search in the graph/node world. It only gets faster the more it is mapped in context. This is where artificial intelligence (AI) works well.

In general, characteristics of modern content technology approaches to managing content like machine learning, AI, and natural language processing to add structure, context, and metadata make it more useful to humans and computers higher up in the content stream. Modern technology is slowly replacing the tired infrastructure of publishing that must be actively managed, all within reasonable timeframes and budgets. These types of changes enable publishers to be in the business of creating and curating content rather than being primarily technology creators and providers.

The scholarly publishing industry, like others relying on content technologies, has been slogging its way through these metamorphoses. It is now applying technologies that truly enrich content for all uses as early in the publication process as possible. The industry is moving forward, and opportunities to leap-frog many issues of our current digital age and correct some of the problems that continue to plague publishers is a real possibility.

We look forward to reviewing this landscape and welcome any comments and/or questions, as well as requests to cover a specific workflow, company, or technology.
Bet You Missed It

Press Clippings — In the News — Carefully Selected by Your Crack Staff of News Sleuths

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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

PHILIP ROTH'S HOME ON THE MARKET

Roth died last year at 85, and his Litchfield County, Connecticut home and 150 acres is for sale for $2.925 million. He lived primarily there from 1996 to 2001, writing American Pastoral, The Human Stain, and I Married a Communist. Afterwards, he split his time between there and NYC.

It’s a three-bedroom clapboard built in 1790 with many period details. One room became a library with metal shelving in the middle. The books will go to the Newark Public Library, and are not part of the sale. Likewise furniture and typewriter that were auctioned.

He socialized with Arthur Miller. Other noted residents of the area were Dustin Hoffman, Graydon Carter, and Meryl Streep.


OBIT OF NOTE

Harold Bloom (1930-2019) Celebrated Yale English professor, author of 40 books, and stalwart defender of the Western canon. The self-declared “monster reader” could cover 1,000 pages an hour. He claimed to be able to recite all of Shakespeare, Paradise Lost, and the Hebraic Bible. He railed against authors of “The School of Resentment.”

“I am your true Marxist critic following Groucho rather than Karl, and take as my motto Grouch’s admonition, ‘Whatever it is, I’m against it.’”

See — The Week, Nov. 1, 2019, p. 35.


His play Same Time Next Year is one of the world’s most-produced plays. He followed with two more Broadway hits: Tribute with Jack Lemon and Romanttic Comedy with Mia Farrow and Anthony Perkins.

See — The Week, Nov. 22, 2019, p.34.
Shopping the New Status Quo: The 41st Society for Scholarly Publishing Meeting

Over 800 attendees from 23 countries assembled at the exquisite Marriott Bayfront Hotel in the beautiful city of San Diego, CA on May 29-31, 2019 for the 41st annual meeting of the Society for Scholarly Publishing (SSP). The theme of the meeting was “Shopping the New Status Quo: Global Perspectives in Scholarly Publishing.” It featured pre-conference sessions, two keynote addresses, a wide variety of concurrent sessions, a plenary preview of new and noteworthy products, and the traditional closing plenary with the Scholarly Kitchen “chefs,” in addition to a large exhibit hall with networking receptions following the day’s sessions.

Opening Keynote — Scholarly Publishing in Africa: Impact Factor vs. Societal Impact

In her opening keynote address, Dr. Mariamawit Yeshak, an Associate Professor at Addis Ababa University in Ethiopia, said that scholarly publishing in Africa dates back only to the second half of the 20th century, and African output represents only 1.7% of the world’s scholarly publications. Africa is struggling to keep pace with the rest of the world. African Journals Online (AJOL), a non-profit organization based in South Africa, provides access to African-published research. In 2000, it indexed only 50 English-language journals; today it covers 523 journals, mainly in the sciences, English, and French, 260 of which are open access.

Today, many African faculty members are publishing in top-rated journals with high impact factors. Although African researchers and universities are benefiting from their scholarly publishing, their society is lagging in many development indicators, and a number of challenges need to be faced:

- **Visibility**: Most of the journals where African researchers publish are not published in Africa, so there is little local visibility.
- **Communication**: Research is not complete until it is communicated. Scientists should be willing to give public lectures and publish summaries of their work in local languages.
- **Language**: This is the biggest barrier to disseminating research work. The language of most publications is English or French, but many people in Africa do not speak these languages.
- **Disconnects from indigenous knowledge**: In Ethiopia, 70% of the society depends on traditional medicine. A two-way flow of knowledge benefits not only African society but humankind as a whole. Society benefits if research results are translated into marketable products and services.

Despite the challenges, African universities are using bibliometric and scientometric data to measure the progress and impact of their faculty members. As a result of their publishing in high-impact journals, faculty members are being promoted and the ranking of African universities is improving globally. At Yeshak’s university alone, 5 full professor and 15 associate professor positions were created in 1½ years.

Keynote Address: Technology and Inclusion

In her keynote address, “Why Inclusion Matters to Technology and Technology Matters to Inclusion,” Betsy Beaumon, CEO, Benetech, noted that 1 in 7 people have a disability, and only 33% of these people are employed, compared to 70% of the overall population. Such people are underrepresented in the top growing fields, especially in the global south where the employment rate is only 10-20% due to cultural stigmas and
lack of access to jobs. Fortunately, this problem is solvable, and some of the global technology giants are starting to work on it.

Digital by itself does not equal inclusive. We can help create possibilities to solve this problem today; education is critical. Benetech empowers communities with software for social good, focusing on equity, justice, and inclusion. For example, it has created Bookshare, the world’s largest online library of e-books for people with reading barriers due to disability (such as the inability to hold a book). Some university presses are now active in putting their books on Bookshare. Other capabilities of Bookshare include reading an audio version of books or making them available in Braille.

In a culture of inclusion, bars, bedrooms, and baby carriages are some places where people use access provisions. Closed captions are becoming common in movies, and there is now a phenomenon called the “curb cut effect.” But laws do not change things so we need to change the culture. Digital inclusion is critical because we live on the Internet and use many tools every day.

Today, software fails because developers do not think about people needing accessibility. Many large companies like Apple are emphasizing accessibility that can be turned on when using a phone. Microsoft has a Chief Accessibility Officer and an active hiring plan. Many visually impaired people are becoming software developers. Education technology has suffered from the “we will worry about them later” mentality. Companies are trying to promote college courses on accessibility.

AI has much promise in homes. Privacy is a problem with all the data that is being collected. People are working on audio systems for deaf people, and “be my eyes” is a system for blind people. Digitizing math is a difficult problem. Many text readers cannot handle images (photos, math equations, chemical notation, etc.).

Why isn’t the accessibility problem solved when we have all these tools? Leaders must determine that they will be inclusive. How can industry lead? If a book can be born digital, it can be born accessible, but many things must come together to make this possible.

We want inclusion — don’t leave millions of people out. Will you be ready? Possible actions for publishers include getting certified by Benetech2 and contributing to Bookshare.3

Interactive Scholarly Works and Enhanced eBooks

This panel discussed how scholars are stretching the boundaries of eBooks to create more dynamic, interactive, and media-rich works. It was kicked off by Jason Colman from University of Michigan and Michigan Publishing Services, who spoke about how Michigan spent the last four years building their own digital publishing platform. They focused on enhanced eBooks since 80% of scholars have rich supplemental content to add to their books. Michigan also has published an interactive scholarly work, “A Mid-republican House from Gabin,” with a 3D model allowing readers to explore the model and text together. (This was very labor intensive, requiring thousands of hours of work!) Jasmine Mulliken from Stanford University Press described “Enchanting the Desert,”4 a digital project including essays about and images of the Grand Canyon. Alexandre Ohlson from LOCKSS discussed preservation approaches, including options such as Webrrecorder and Emulation.

Want to Know How Researchers Feel About Scholarly Publishing? Let’s Ask Them

This standing-room-only session featured three panelists discussing their perspectives on scholarly publishing and the role that researchers play in it. After short presentations, the audience was encouraged to contribute their views. The panelists and their concerns were:

- Andrew Conway, Claremont Graduate University: He publishes in American Psychological Association (APA) journals, is Associate Editor of one of them, as well as for a startup journal that is not working with a publisher. Many professors are frustrated with big publishers and are looking to smaller startup journals, but students must publish in large journals because of tenure requirements.
- Laura Crotty Alexander: University of California at San Diego and VA San Diego: She publishes in scientific journals, but it is difficult to find the one that is the best match for her research. She is frustrated by publishers frequently asking for more money.
- David Salas-de-la Cruz, Rutgers University: He studies the interfaces between proteins and carbohydrates and is under pressure to get a grant and tenure within five years. Some of that time must be used for setting up a lab, recruiting students, etc. He wrote a historical paper to get a publication record and a higher impact factor. A major worry is timing and the need for fast publication times.

Here are some of the questions posed by the panelists and the audience (see the online version of this article for the responses).

- Can a publisher replicate a researcher’s work? How has research changed when you engage with students and have to show them how to do the research?
- How important is it to publish in an OA journal?
- What is wrong with putting things online?
- How do you feel about open peer review?
- We have many new metrics. Do researchers pay attention to them?
- Should we be publishing in our societies’ journals?
- Where are you going to support your work and is there something the library can do for you?
- Any editorial office will add value without increasing turn-around time.

An Honest Conversation About Global Academic Publishing: Paywalls, APCs, and Ever-Increasing Volume

Representatives of three publishers discussed the following issues:

- Why do publishers launch so many journals?
- Are too many articles being published?
- How can paywalls be justified?
- Why are APCs so high?
- As the world moves toward OA, how do we meet the challenges of the people we serve?

Beth Craanen, Director of Publications, The Electrochemical Society (ECS), wondered how we can build a sustainable and inclusive future for academic publishing. She said that we are not an inclusive industry now.

ECS publishes three journals which had 1,900 institutional subscribers in 2018, 42% of which were OA. Subscriptions are being leveraged to get to more OA publications. In 2019, subscription prices were raised for the first time in four years. Its digital library, ECS Plus, has over 1,000 subscribers and had 3.1M downloads in 2018. A Read & Publish model has been successful. Subscription prices are published, so there is no need to spend time negotiating pricing. ECS works with the Copyright Clearance Center to get authors to publish their journals. The long term goal is that research is meant to be shared. As a promotion, ECS took their paywall down for a week in April 2019 and allowed subscribers to download articles at no cost. One result was that ECS’s business models are not built around APCs, and 91% of its articles are published OA at no cost to authors.

Tim Vines, Managing Editor, Origin Editorial, a consulting firm advising publishers on peer review, said that the journal system is inefficient. Many researchers are rushing to get their work published, and deciding which articles to accept is expensive for publishers. Each time an article is submitted to a journal, it must be reviewed again, and APCs must be paid, so the APCs are covering the costs of reviewing and rejecting up to 90% of the articles submitted. Vines noted that $4,000 is a high price to pay for publication. High APCs are excluding many researchers, particularly those from low- and middle-income countries, from publishing in selective OA journals. The following graph shows the effect of APCs on acceptance rates.

continued on page 72
A solution to this problem is to separate publication and submission fees and create a network of brokers who would review articles and find journals that are interested in them. The number of submissions that authors must make (now averaging 2.5 per article) would be minimized. Vines estimates that half of the articles could be accepted without any additional peer review, and trust in publishers by authors would be enhanced.

Wayne Sime, CEO, Association of Learned and Professional Society Publishers (ALPSP) discussed Plan S, an initiative to promote OA publishing and the key issues that societies face as a result. ALPSP supports the aims of Plan S to escalate movement of journals to a fully OA business model but it must be recognized that the complexity and short time frame of the transformation could introduce unintended consequences and barriers because funding is not universally available to all publishers. A survey of consortia of publishers, especially small ones publishing fewer than five journals, found that the vast majority of them are willing to work together towards the goals of Plan S.

At the end of his presentation, Sime announced that the deadline for compliance with Plan S has been moved from January 1, 2020 to January 1, 2021, which will help mitigate one of the barriers to implementing Plan S.

I Didn’t Know That Was Possible: Cutting Edge Technologies and Techniques to Challenge Cultural Norms

The room was full for this dynamic panel presentation from a group of tech start-ups who came from a research background. Each presenter was a researcher who started a business to address a personal pain point of tech start-ups who came from a research background. Each presenter was originally from outside the industry. Sometimes you need that outside perspective to get innovative thinking. The first speaker was Abeni Wickham, CEO/Founder of SciFree AB. Scientific Freedom aims to automate the peer review workflow. According to an OECD poll, the number one thing researchers wanted is greater transparency in the peer review process, so this was the goal. Next, Tyler Whitehouse, President and CEO of Gigantum, discussed his open-source, cloud-based collaboration platform which allows the researcher to automate tasks, configure containerized environments, and bundle code, data, environment, and results. The final speaker was Pascal Gallo, Founder and CEO of LakeDiamond. Their Swiss-based labs produce diamonds for high tech applications. “Diamond is the new silicon.” They used blockchain to fund their new business, thereby disrupting the traditional model.

Metrics of Success: How to Measure the Impact of OA Books?

This panel explored what researchers understand about the reach of OA books, how they are measuring it, and what they would like to see in the future. Doug Dechow from Chapman University opened the discussion with the author’s perspective. He co-edited a festschrift for Ted Nelson in 2015 titled “Intertwined.” It was published open access by Springer Nature, and the authors had differing reactions: academics were happy that it would be OA, but authors from outside academia were less thrilled. In Computer Science, OA is “a dirty word.” Agata Morka from Springer Nature, who also moderated the panel, covered the publisher’s perspective. OA books have seven times more downloads, but numbers don’t always tell the whole story since there are blind spots in the methodology used to create OA metrics. Next, Rick Anderson from the University of Utah covered the librarian perspective, and spoke about trust, relevance, and usefulness in the context of OA metrics. Kevin Hawkins from the University of North Texas Libraries closed the panel. He is Co-Project Director (co-PI) for a Mellon funded project, “Understanding OA Ebook Usage: Toward a Common Framework.” The working group is working to build a “Data Trust” as an “independent intermediary among industry stakeholders, compiling and analyzing data on behalf of the members of the trust.” Findings of their final white paper are included in this slide.

Can Subscriptions and OA Play Well Together?

Currently, OA publications are supported by Author Processing Charges (APCs) levied on article authors, their institutions, or their funders. Subscriptions are considered to be a separate alternative. Speakers in this session considered the possibility of subscription and OA journals cooperating to provide an alternative to APCs.

Raym Crow, Managing Partner of the consulting firm Chain Bridge Group, described the “Subscribe to Open” (S2O) model which targets existing subscribers and procurement systems and invites them to convert their subscription journals to OA. If all subscribers participate, then access becomes open. The publisher controls the risk of this process and can provide for changes in demand for their journals. The process is repeated every year and allows publishers to return OA journals to subscription access if necessary. Publishers must agree to a slight reduction in revenue which is covered by a small increase in cost to readers.

The S2O model was adopted by Annual Reviews, Inc., a nonprofit publisher dedicated to synthesizing and interacting knowledge for the progress of science and the benefit of society. Richard Gallagher, President and Editor-in-Chief, Annual Reviews (AR), noted that academic publishing is currently in turmoil, and S2O is possibly a way to make content available to all.

Knowable Magazine was established by AR as a digital magazine to bring complex scientific knowledge to a wide and varied audience. Another of AR’s journals, the Annual Review of Public Health experienced a significant growth in readers when it became OA. It had 160,000 downloads in March 2019. Before the journal became OA, it had about 2,000 institutional subscribers, which grew to 12,000 afterwards. The increase came from readers in a wide variety of disciplines: academia, healthcare providers, legislatures and government agencies, a pollution control agency, the Air Resources Board, etc.

AR explored several options to moving to OA: APCs, Read and Publish, philanthropy, and leveraging of existing relationships and systems (the one chosen). The process began in 2015; approval from the Board was obtained in 2016, and a grant was received from the RW Johnson Foundation in 2017. The first OA product was produced in 2018. The reaction from librarians has been positive; if the experiment is a decisive success, more OA titles will be added in 2021.
SSP Previews: New and Noteworthy Products

Moderated by David Myers, Owner of DMedia Associates, Inc., the final day of the conference opened with a session of 5-minute “lightning” talks by representatives of 13 organizations describing their new products. Innovation — doing the same things better — is no longer a luxury but is essential in today’s environment. It leads to disruption, which is doing new things that make the old things obsolete.

Here are the new products described:

• **American Society of Plant Biologists**: Domain Informational Vocabulary Extraction (DIVE): Allows authors to curate key terms and concepts and integrates journal terms with objects in genomic databases.
• **Copyright Clearance Center**: RightsLink Author and OA Agreement Manager: Uses machine learning to engage authors at every step of production and provides aggregated billing and cross-publisher reporting.
• **Editage**: Automated Document Assessment: A manuscript readiness solution for publishers that provides manuscript assessment, peer review assistance, publication ethics, and post-acceptance assistance, and readability scores.
• **Exeter Premedia Services**: Provides editorial services, data services, artwork and design, and project management. The flagship product is Kryia which makes publishing simple and automates submission to external databases without need for knowledge of the requirements of online repositories.
• **Kudos**: Helps researchers plan and report on communication activities.
• **LibLynx**: Cloud-based identity and access management for online resources of publishers and libraries.
• **Molecular Connections**: Escalex for finding food regulations in a database of over 10 million articles indexed over the past 15 years and a workflow system to support the indexing process.
• **Morressier**: A platform for sharing early-stage research allowing scientists to discover information and be discovered by digitizing conference presentations, poster sessions, etc. before, during, and after conferences.
• **Paper Digest**: An AI-based article summarization service so that researchers can learn more in less time through overcoming language barriers. Users enter DOIs of articles of interest and receive summaries.
• **Research Square**: Allows authors to post a paper as a preprint when it is submitted to a journal. Articles can be reverted to a preprint if they are rejected.
• **Ripeta**: Provides credit reporting for science. Disseminates practices and measures to improve the reproducibility of scientific research.
• **SciScore**: Scans methods sections of scientific articles to test the percentage of resources that should have a resource research identifier (RRID). Warns authors of problematic data such as contaminated cells before publication.
• **SelfStudy**: Provides personalized learning from existing assets and adds value to content with learning and teaching solutions.

The audience voted on the best product, and **Paper Digest** was the winner.

**Flipping Out: Plan S, Read-to-Publish, and Humanities Publishing**

Allison Belan, the session moderator from Duke University Press, said that the scope of the discussion was limited to Humanities and Social Sciences (HSS) journals, and “Flipping” subscription-based journals (not born OA). Allison also acknowledged that the discussion would be limited by who was in the room, and wouldn’t cover independent society publishers, fully OA publishers, and small/medium colleges.

Panelists included Lisa Hinchliffe, University of Illinois, Robert Dilworth, Duke University Press, Emily Poznanski, DeGruyter, and Mathew Willmott, California Digital Library. The moderator posed a series of questions to the group:

1. What are Plan S and “transformative agreements” and how do they address or impact HSS publishing?
2. Do the requirements in these emerging mandates and levers pose particular challenges for HSS scholarly culture and publishing?
3. Will such agreements, when pursued at scale, sustain the publishing operation?
4. Is your approach to OA strategy for HSS different than for STM?
5. What do you think are the most viable models for sustaining HSS scholarly publishing?

The audience was encouraged to share their experiences and challenges as well.

**Community Approaches in Scholarly Publications**

Scholarly publishing deals with various types and sizes of communities. But what do we mean by “community” and why do we need them? This session was introduced by providing the following definitions of a community:

• A group of people who have come together with a shared purpose,
• A group where information flows in multiple directions, not just out from the center,
• A place where participants can learn, and
• A group to which members feel like they belong, therefore committing to it.

We need communities because they provide a sharing environment for group accomplishments that cannot be achieved individually.

Speakers in this session were asked to use no more than three slides to answer the following questions:

• What does “community” mean to you and your organization?
• How is your community approach unique?
• What question would you like to pose to the audience?

Howard Ratner, Executive Director of CHORUS, said that CHORUS tries to reduce the burden of OA and OA mandates, so it focuses on five services and maximizing the effectiveness of identifiers.

continued on page 74
The publishing process can be broken down as follows:

"Are we doing what seems to be professional in publishing journals?"

The dean of the library said that in establishing services, librarians should never say no but promote the features of the proposed system and its ease of use. One of the services approved was journal publishing by the library. But on investigation, they received a wake-up call from an article by Kent Anderson in the Scholarly Kitchen listing 96 things publishers do (updated in 2018 to 102 things). 14

In establishing a library publishing services, the question became “Are we doing what seems to be professional in publishing journals?” The publishing process can be broken down as follows:

- Sharing the load:
  - Dividing up tasks,
  - Use a Digital Commons platform (such as bePress) to do some things that authors or publishers usually do,
  - Authors do copy editing and establish styles,
  - Editors must do most of the work, start doing basic copy editing, and find niches for new journals,
  - The library gets ISSN and DOIs,
  - Other (unassigned) tasks are done by the university (HR etc.).

Help from friends is also useful:
- The SSP Mentorship Program,
- Library. Many librarians don’t look in the catalog for books about what they are working on,
- Conferences provide opportunities to listen to how other people are doing things and what they are doing.

The SFASU library has listed the journals it has published on its website. 15

Kevin Hawkins, Assistant Dean for Scholarly Communication, University of North Texas (UNT) Libraries contrasted two models for publishing books by libraries (the UNT library’s service is called Aquiline Books) and university presses:

Here is the Aquiline Books fee structure

The fee structure makes authors aware of the costs of publishing which are covered up front and vary by project.

Closing Plenary: The Scholarly Kitchen Live


Scholarly Kitchen chefs attending the conference assembled for the final session and discussed a wide-range of issues. The session was moderated by Angela Cochran, Managing Director and Publisher, American Society of Civil Engineers, and incoming SSP President.
In the Scholarly Kitchen as of late May, there have been 643,635 page views to date this year (up from 554,072 last year). There have been 11,505,849 total page views since 2008 and 4,748 average page views per day this year (up from 4,310 last year). @ScholarlyKitchen has 20,000 followers.

We are entering into a great acceleration, especially of mergers, and an increase in OA. Everything seems like it is happening at once.

Here are the remarks made by the chefs.

Robert Harrington — Big publishers are morphing into data analytic companies, and there are many opportunities and pitfalls. For example, Elsevier has a significant repository of data on citations and readership, so they can predict trends and track how students are doing. Institutions may become reliant on these tools. There is now a rapid move towards digital textbooks, which lets them monitor how long students take to do their homework, etc. But it is hard to manage data, so institutions should think about their data policies.

David Smith — The capability is available to all of us to use technology and data if we can develop a business use for it. Compute power is the power supply of the information age. The academic work on AI, big data, etc. was done 40-50 years ago. It has never been easier and cheaper to do this. The scarcity is in the knowledge. Our world is not leveraging how big data can be used; we need to think about what a true scholarly infrastructure should be. We need to talk about dissemination, clarification, classification, and especially ethics. Quantum computing will be commoditized in the next 30 years.

Ann Michael — Privacy concerns, bias, and job replacement are coming to the fore. Innovation outpaces our ability to manage it. It is hard to mitigate risks. If we listen to each other, we will respect each other. What do we do to prevent embedded bias in AI? Be respectful and understand that just because it is your opinion, it is not necessarily right. The exciting thing about AI is that we can learn from each other.

Lettie Conrad — Listen to all the voices and shine light on different perspectives so we don’t build bias into systems. Slow down a little; speed is venerated, but biases come in when we move quickly. Look at who is being left out of the conversation. When we slow down we are better able to cope with change. Get lots of different advice and go outside your sector.

Rick Anderson — The acceleration and creation of new knowledge is wonderful but it puts lots of pressures on scholarly creation. The number of articles published and number of journals have grown steadily over the last century by 3-5%/year, which is a result of research growth. More articles published and number of journals have grown steadily over the last century by 3-5%/year, which is a result of research growth.

Lisa Hinchcliffe — Transformative agreements have arisen with the question of how do we scale what is needed. Most libraries are seeking to pursue costs neutrally, but they may not be neutral for the publisher. Some read-only institutions may eventually stop paying because there will not be a need to pay to read, so all the costs are borne by publishing institutions. We will then know who the reading institutions are and who the publishing institutions are. Read the fine print in the agreements and recognize that transformative agreements primarily benefit publishers who were previously dependent on subscriptions.

Alice Meadows — Plan S people have given us a sense of urgency. We should be ready to be leaders and become a community. It’s much easier to focus on areas where we cannot agree. We must get better by focusing on where we can cooperate and collaborate.

Questions and opinions from the audience:
• What can blockchain do to help scholarly publishing?
• How much are we thinking about text and data mining as a business operation?
• Technology should be solving human problems in publishing.
• How do we increase the coverage geographically of the Scholarly Kitchen?
• We want to encourage people to submit guest posts.

The 42nd SSP meeting will be held May 27-29, 2020 at the Westin Waterfront Hotel, Boston, MA.

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.aspx). He is the Editor of Personal Archiving: Preserving Our Digital Heritage, 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 42 years.

Leah H. Hinds was appointed Executive Director of the Charleston Conference in 2017, and has served in various roles with the Charleston Information Group, LLC, since 2004. Prior to working for the conference, she was Assistant Director of Graduate Admissions for the College of Charleston for four years. She lives in a small town near Columbia, SC, with her husband and two kids where they raise a menagerie of farm animals.

Endnotes
4. https://www.press.umn.edu/9231782/mid_republican_house_from_gabii
5. https://www.sup.org/books/title/?id=25726
6. https://www.coalition-s.org/
7. https://www.scientificfreedom.org/
11. https://deepblue.lib.umn.edu/handle/2027.42/143840
12. https://www.annualreviews.org/page/subscriptions/subscribe-to-open
15. https://scholarworks.sfasu.edu/journals.html
The first batch of people profiles in this issue recognizes ATG Media’s 2019 Up and Comers. Who exactly is an “Up and Comer,” you ask? They are librarians, library staff, vendors, publishers, MLIS students, instructors, consultants, and researchers who are new to their field or are in the early years of the profession. Up and Comers are passionate about the future of libraries – they innovate, inspire, collaborate, and take risks. They are future library leaders and change makers, and they all have one thing in common – they deserve to be celebrated.

In addition to having their profiles appear in this issue, they will be featured in a series of scheduled podcast interviews that will be posted on the ATGMediaPodcast.com website as well. The award winners were also recognized at the 2019 Charleston Conference First Time Attendee Reception in November.

ATG Media would like to thank Erin Gallagher (Electronic Resources Librarian, George A. Smathers Libraries, University of Florida, gallagher@ufl.edu) for all her work with organizing the nominations and gathering the profiles from the 2019 Up and Comers. Congratulations to all who were nominated.

Negeen Aghassibake
Data Visualization Librarian
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WHAT ATTRACTS YOU TO A CAREER IN LIBRARIES: Throughout my undergraduate years, I had a difficult time settling on a focus or single career path. When I discovered librarianship, I was thrilled to find a way to keep learning about different subjects while also supporting students, faculty, and staff.

FAMILY/PETS: I have a wonderful family and I am so grateful to them for being so supportive and loving. My mom has taught me that we never stop learning, my dad has taught me that there’s always time to laugh, and my sister is the best friend anyone could ever have.

FAVORITE BOOKS: I recently finished Michelle Obama’s Becoming, which was so wonderful and empowering. Another book I love is Maman’s Homesick Pie by Donia Bijan, which feels like home.

THE CHANGE I HOPE TO MAKE IN THE PROFESSION: I would like to create more equitable and inclusive spaces in libraries, particularly for library staff. I’m still learning what this means and how change happens, and I suspect I’ll never stop learning, but I’m hopeful that this work will continue to grow.

Lindsay Barnett
Collection Development & Scholarly Communication Librarian
Yale University, Harvey Cushing/John Hay Whitney Medical Library
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WHAT ATTRACTS YOU TO A CAREER IN LIBRARIES: The ability to connect researchers, faculty and students to the resources they need to create new scholarship; helping authors make their research more visible and discoverable.

PROUDEST MOMENT OF YOUR CAREER SO FAR: My work on Yale University Library’s License Review Team which gives me the opportunity to advocate for libraries and their users when negotiating vendor contracts.

FAMILY/PETS: Charlie the shih tzu!

Elizabeth (Lizzie) Cope
Assistant Librarian, Electronic Resources
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PROUDEST MOMENT OF YOUR CAREER SO FAR: I made the transition from being an elementary school librarian to managing electronic resources at an academic institution. It was a steep learning curve, but I continued on page 77

Mentors/People Who Inspire Me: All of my colleagues in the Medical Library and the profession at large, who creatively and intelligently respond to the evolving needs of our patrons every day!

The Change I Hope to Make in the Profession: Empower authors to take more ownership over their scholarship; expand the definition of what collections and services libraries are able to provide to our users.

Where Do I See the Industry in Five Years: Library collections will continue to expand to include non-traditional materials such as software and analysis tools, librarians will increasingly become the experts in training users on these resources.

Meghan Cook
Coordinator of Library Operations and subject expert on the Research Platform Team for the University of South Florida School of Geosciences.

I am not currently enrolled in the MLIS degree program, but taking one course at a time as I complete my Ph.D. in Geology. Once my Ph.D. is completed, I will enroll in the MLIS program.

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https://works.bepress.com/meghan-cook/

WHAT ATTRACTS YOU TO A CAREER IN LIBRARIES: Not necessarily to be or become a librarian, but to create a bridge between my discipline (geosciences) and the world of information available to students and educators.

Proudest Moment of Your Career So Far: Winning this award! Also, anytime I am able to facilitate a service or product the library offers to my fellow graduate students that make their life easier.

FAMILY/PETS: My husband and I have 2 children (with one on the way), 2 cats and a fish.

IN MY SPARE TIME: I go to Disney World with my family and work in my garden. I am a big fan of Florida native plants so work on trying to keep my garden as native as possible.

FAVORITE BOOKS: Any Clive Cussler books and books/journal articles that help me complete my Ph.D.!

Mentors/People Who Inspire Me: Matt Torrence who is the other half of the Geosciences Research Platform Team, Drew Smith who is a librarian at the USF Libraries and gives great advice and strategies on how a non-librarian can navigate the library world, Jeff Ryan, my Ph.D. advisor, and my Mom who is always there for me and keeps me grounded.

The Change I Hope to Make in the Profession: I hope to blend my expertise in the geoscience world with the information science world to create a hybrid liaison model of sorts to support the needs of both the geosciences and the library.
worked incredibly hard to get up to speed. I was surprised at how much elementary education prepared me for working in higher education! Not as many shoes to tie, but a need to be flexible and patient. I now know that I am capable of changing and growing to meet the demands that come with electronic resources.

FAMILY/PETS: My husband and I love taking care of our three cats Leia, Han, and Pony. We also have a sweet rabbit named Mort who thinks he is a cat.

IN MY SPARE TIME: I enjoy gardening, cooking, and hiking in the Great Smoky Mountains.

FAVORITE BOOKS: I’ll read anything by Terry Pratchett, Neil Gaiman, and Brandon Sanderson. I also love The Adventure Zone (because podcasts are like audiobooks, right?).

THE CHANGE I HOPE TO MAKE IN THE PROFESSION: My department works “behind-the-scenes” in the library, but I don’t want to be thought of as “behind-the-scenes”! We may not see patrons in the conventional sense and you may not even see our work, but we are incredibly important advocates for our patrons needs. I hope to be louder!

WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I see more opportunities for transformative agreements and all-around new flavors of agreements with publishers. I also see new processes for acquiring streaming media and data sets, a continued focus on accessibility, and (fingers crossed) more streamlined patron authentication and access.

Moon Kim
Acquisitions Librarian
Ohio State University
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WHAT ATTRACTS YOU TO A CAREER IN LIBRARIES: Without much long-term thought, I applied for a shelving position in the library when I was in college and that was my gateway job into libraries. But the reason why I stayed is because of the positive impact libraries have in our communities and the profession’s strong commitment to social justice.

FAMILY/PETS: Please see my picture!

IN MY SPARE TIME: I enjoy exploring different parks with my dog, traveling, bicycling, trying new restaurants, going to concerts, binge-watching tv shows and movies, and sleeping.


MENTORS/PEOPLE WHO INSPIRE ME: I have been very fortunate to have a supportive network of mentors and peer mentors who continuously inspire me. Luiz Mendes and Murtha Baca who were both my professors in library school and leading practitioners in cataloging and metadata; Rick Burke who taught me about the value of consortia; and my peer mentors, Andrew Carlos and Ray Pun, for being my sounding boards and collaborators.

THE CHANGE I HOPE TO MAKE IN THE PROFESSION: Building collections that not only support and respond to the communities we serve but also reflect who they are.

WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: Five years is a long time where a lot can happen but short for transformative changes to take effect. The progress I would like to see in five years are:

- more diversity of content, which includes the whole lifecycle of information resources from creation to the shelf/screen
- less concentration of vendors and publishers

- more transparency and ethical practices in negotiations
- less stratification in libraries
- more advocacy for making invisible labor visible (e.g., technical services work).

Jocelyn Lewis
Head, Resource Acquisition
George Mason University
<lewis21@gmu.edu>

WHAT ATTRACTS YOU TO A CAREER IN LIBRARIES: I’m someone that seeks out a lot of information and realized that I like helping others connect to that information and find answers. Librarianship offered an opportunity to do that while also surrounding myself with people that are lifelong learners looking for ways to serve others.

FAMILY/PETS: Daschund/beagle mix named Otis.

IN MY SPARE TIME: Love being outdoors, hiking, biking and fishing, exploring local breweries and wineries, rootin on my favorite sports teams (Go Nats & Chelsea!), and seeing live music whenever I can.

FAVORITE BOOKS: Brideshead Revisited, Little Women.

MENTORS/PEOPLE WHO INSPIRE ME: My colleagues. I’m lucky to work at an institution where I’m continually amazed at all the creative and useful ideas and projects being pursued around me.

THE CHANGE I HOPE TO MAKE IN THE PROFESSION: To help make the profession appealing to a wide, diverse population of people who are given many opportunities for creativity, growth, leadership, and flexibility.

WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: Academic Librarianship is continually expanding in terms of the skills required as well as professional opportunities. It has moved and will continue to move far beyond providing resources and reference services. I think we will see the continued expansion of transformative publishing models, the librarian as data expert and curator, and libraries not as a place but as a service and/or partner. Even though it’s been discussed at length before, libraries are going to continue dealing with budget and staff constraints that will make consortial/group purchasing, lending, and publishing agreements even more important. “Big deal” break-ups and new or more-widely adopted acquisitions and collection models will continue to happen, while the acceptance of a variety of open access models will be more established rather than “initiatives” and pilots. All of this will lead to new norms and workflows regarding open access and holdings management relating to acquisitions, licensing, troubleshooting, assessment, etc. As libraries continue to change and adapt, communication and improving user/student experiences will be key to keeping libraries relevant and integral to university life.

Colin Nickels
Experiential Learning Services Librarian
NC State University Libraries
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WHAT ATTRACTS YOU TO A CAREER IN LIBRARIES: The focus on patrons and their needs. Being in an industry where money-making isn’t the goal and instead helping students and faculty achieve theirs is very fulfilling.

PROUDEST MOMENT OF YOUR CAREER SO FAR: Being accepted to and completing the NCSU Libraries Fellows Program.

FAMILY/PETS: I have a wife who I met while working for the Libraries at NC State. We have two children, Milo who’s five years old, and Clementine, who’s one and a half.

continued on page 78
Victoria Seng
Graduate Research Assistant and 2nd Year MSLS Student
University of Kentucky
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WHAT ATTRACTS YOU TO A CAREER IN LIBRARIES: I’m a details gal who enjoys organizing, gathering information, books, and serving others. Librarianship encompasses all these things and is the perfect service oriented career I have been searching for.

PROUDEST MOMENT OF YOUR CAREER SO FAR: Completed inputting license terms for all electronic resources at UK Libraries. (I read hundreds of license agreements and amendments, so it was a monumental task!)

FAMILY/PETS: I have a younger sister who is my ultimate BFF and travel companion. I don’t own any pets at the moment, but would love to have a golden retriever and a cat.

IN MY SPARE TIME: Reading, writing, Irish dancing, traveling, and trying out new restaurants.

FAVORITE BOOKS: All-time favorites are To Kill a Mockingbird, Persuasion, and Where the Crawdads Sing. Also love mysteries from authors like Jane Harper, Louise Penny, and Ruth Ware.

MENTORS/PEOPLE WHO INSPIRE ME: Mentors within the library field include the librarians at the Obion River Regional Library, the Obion County Public Library, the Gibson County Public Library, and W.T. Young Library. The ladies at the first three helped me start my career in the public library sector. They are incredibly compassionate and hard working. I met the ERM librarians at W.T. Young Library when I started library school at UK. I cannot thank Jennifer Montavon-Green and the rest of the ERM team enough for their help and direction with my foray into academic librarianship. They are rock stars in the field! Honestly, I’ve been incredibly blessed to be surrounded by innovative and talented people at each of the libraries I’ve worked at. So many people have patiently provided invaluable guidance and advice. One day, I hope I can repay their kindness by offering the same support to others.

Outside of the industry, my grandmother and mom inspire me. They instilled a strong work ethic and proved anything is possible if you believe in yourself and work hard to achieve it.

THE CHANGE I HOPE TO MAKE IN THE PROFESSION: Working in ERM at UK, I’ve been fortunate to learn all about Acquisitions. I find the licensing electronic resources component within that process fascinating! With the tides of change on the horizon, I look forward to helping shape future licensing and purchasing models within the industry.

WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I would hazard to say that in most if not all communities, libraries are lifelines. Libraries are essential in both the public and academic sector in terms of providing an even playing field for access to technology and information. Librarians also advocate for the needs of its users. So I see the role of advocacy greatly increasing within the industry.

Ariana E. Santiago
Open Educational Resources Coordinator
University of Houston Libraries
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https://sparcopen.org/people/ariana-santiago

WHAT ATTRACTS YOU TO A CAREER IN LIBRARIES: I love the collaborative nature of libraries – I get to work with amazing people, and we work together every day to reach our goals in supporting the campus community. There are endless opportunities to learn new things, solve problems, and help people.

PROUDEST MOMENT OF YOUR CAREER SO FAR: A highlight of my career was participating in the Minnesota Institute for Early Career Librarians from Traditionally Underrepresented Groups in 2014. I spent a week engaging with leadership, emotional intelligence, and program development skills along with a cohort of early-career POC librarians. I was proud to be selected for this program and continually apply what I learned there. More recently, being selected as a curriculum designer and presenter for the forthcoming ACRL Roadshow on Open Educational Resources and Affordability.

FAMILY/PETS: Two cats, Knightro and Boggle.

IN MY SPARE TIME: I enjoy watching television and going to yoga.

FAVORITE BOOKS: A few that I have recently read and enjoyed are Red, White, & Royal Blue by Casey McQuiston, In the Country We Love: My Family Divided by Diane Guerrero, and We’re All in This Together by Amy Jones. To be honest, I don’t read books very often, but I’ve been trying to change that this year.

MENTORS/PEOPLE WHO INSPIRE ME: I’m inspired by people who practice empathy and compassion, and by those who think differently than I do. Some people who have been mentors to me at one point or another include: Camille Thomas, Kerry Creelman, Mark Puente, Michele Santamaria, Alexis Logsdon, Valeria Molteni, Kelly McElroy, and Kristine Shrauger.

THE CHANGE I HOPE TO MAKE IN THE PROFESSION: I hope to help make the profession a more inclusive and equitable space. I work towards this by aiming to be inclusive in my leadership and collaborative roles and making space for underrepresented voices.

WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: With the growing interest in open educational resources (OER) and need for OER support, I see academic libraries having an even more established leadership role in Open Education through advocacy, service development, outreach, and OER production.

Phil Willke
Electronic Resources Librarian
State Library of Ohio
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https://library.ohio.gov/

WHAT ATTRACTS YOU TO A CAREER IN LIBRARIES: Helping people get the information they need, whether that’s a research article or a leisure read. Everyone needs something, and the vast majority of librarians are so eager and willing to help. I love being surrounded by colleagues who are committed and invested in their work to help others.

continued on page 79
PEOPLE PROFILES ENCOURAGED

Benjamin Bradley
Discovery Librarian
University of Maryland Libraries
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7649 Library Lane
College Park, MD 20742
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BORN AND LIVED: I was born in North Carolina, and I’ve also lived in Alaska, Wisconsin, and Connecticut. I now live in Maryland where I’ve lived for 7 years.

IN MY SPARE TIME: I like to go to local board game meet-ups; they’re often at my local libraries!


Catherine Eilers
Information and Reader Services Librarian
Highland Park Public Library
494 Laurel, Highland Park, IL 60035
<ceilers@hplibrary.org>

BORN AND LIVED: I’ve lived in Illinois my entire life except for four years in Kansas City, Missouri. I currently live in Chicago.

PROFESSIONAL CAREER AND ACTIVITIES: I began my career as a technical services librarian in an academic library and now work in reference and readers’ advisory in a public library.

FAVORITE BOOKS: I can never answer this question! Some of my favorites from 2019 are Orange World and Other Stories by Karen Russell, Exhalation by Ted Chiang, Soon by Lois Murphy, Feast Your Eyes by Myla Goldberg, and Drive Your Plow over the Bones of the Dead by Olga Tokarczuk.

PHILOSOPHY: Meeting the basic needs of all should remain the primary goal of human endeavors.

Emily Alinder Flynn
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https://readwritelib.com
https://movingbookmark.wordpress.com/

IN MY SPARE TIME: I enjoy Columbus’ festivals, international restaurants and markets, libraries, and parks with my family.

FAVORITE BOOKS: Some of my favorite authors include Aravind Adiga, Alyson Hagy, Haruki Murakami, Sue Grafton, Kevin Kwan, Ha Jin, and Jonathan Franzen.

PHILOSOPHY: Metadata runs the world. It’s mostly invisible though, which is why it doesn’t get as much care and attention as it should, in libraries and society more generally.

Beth Guay
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IN MY SPARE TIME: Gardening, biking.

PROFESSIONAL CAREER AND ACTIVITIES: Librarian.

MENTORS/PEOPLE WHO INSPIRE ME: Two managers I had early in my library career. Stevo Roksandic at Mount Carmel Health Science Library and Loren Scully at the Dublin Branch of the Columbus Metropolitan Library. Both were understanding of my early career goals, as well as incredibly empowering and supportive in helping me work towards those goals. I wouldn’t be where I am today without those two.

THE CHANGE I HOPE TO MAKE IN THE PROFESSION: To continue the path towards more easily accessible information. From limiting paywalls to easier usability for all library services, I feel this is the way we’re going and I’m excited to be a part of it. I also just want to make people more excited about libraries in general.

WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I don’t know if we’ll be in a more Internet-friendly, post-MARC world in just five years, but we can certainly hope to have a better system for linked data than we do now, BIBFRAME or otherwise. I also hope to see a better collaboration between libraries and publishers, especially regarding OA. The current environment doesn’t seem sustainable, and less contention would be great for users, who seem to not know or care how money and availability are linked.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I would hope to see ever-increasing cooperation between academic and public libraries. Collaboration can support lifelong learning and ensure that the shift toward digital materials does not erase the kind of resource sharing currently available through interlibrary loan.

WINNING a 2019 Charleston Conference Up and Comer Award! But also participating in Ohio’s ILEAD USA program in 2017 and being part of the selection committee for Library’s Connect Ohio, a five-year collaboration between public, academic, and school libraries to provide all Ohioans with free access to dozens of online resources.

FAMILY/PETS: Two nieces and one nephew – Hayden, Adi, and Landon. One cat – Rhaegar “Ray.”

IN MY SPARE TIME: Like many librarians, reading and Netflixing. I also enjoy spending lots of time outdoors hiking, biking, running, and just generally being active. My favorite place to read is outside on a hot day with a cool drink.

FAVORITE BOOKS: The Razor’s Edge by W. Somerset Maugham. I read Of Human Bondage in high school and didn’t get it, but several years later I read much of Maugham’s short stories and fell in love with his writing style. I then read The Razor’s Edge, coinciding with a transitional time in my life, and it’s been one of my favorites ever since.

continued on page 80
MORIAH GUY
New Business Development Manager in Library Technical Services
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BORN AND LIVED: I was born in Campbelltown, Australia. I’ve lived in: Sydney, Australia; Kent, WA; Keensburgh, CO; Jefferson County, WI; Cedar City, UT, and the Greater San Diego, CA area.

EARLY LIFE: Throughout childhood, you could find me either training horses or training dogs. I was an active 4-H member that lived to work with animals.

FAMILY: My immediate family consists of three Chihuahuas (Genevieve, Dobby, and Tolkein), 4 koi fish, and a software developer.

IN MY SPARE TIME: I enjoyed reading books as well as attempting to write them. I also enjoy puzzles, DnD, and baking. Most nights of the week, you can find me at the Karate Dojo where I work on learning traditional karate style known as Shito Ryu.

FAVORITE BOOKS: This is a hard one, I’m a big fantasy buff, so of course I love all the major series, but I think all fantasy buffs have a special shelf set aside for JRR Tolkein’s works. My mother is also an author with over 30 books published. She has a shelf to herself, as well.

PET PEEVES: Starting a new puzzle or book on a Sunday night and not finishing it!

PHILOSOPHY: Make it count! Whatever you do in life, do it to the best of your ability. Sure, bad days happen, but the vast majority of days I should go to bed knowing I did something that helps me work towards creating a greater tomorrow.

MOST MEMORABLE CAREER ACHIEVEMENT: Winning the New Leader Award for Technical Services from the California Library Association’s Technical services group was up there. I would also say getting my MMLIS degree.

GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW: A personal goal I have, I would like to finish writing my book, not necessarily publish it, but just finish writing it.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: So much change is occurring in technical services. Today it was announced that ExLibris is acquiring Innovative. With LSP migrations being one of the biggest tools for change in librarianship, these large scale movements will have far reaching reactions.

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BORN AND LIVED: Born in Seymour, IN, but grew up in North Vernon just 16 miles east. Lived in Cincinnati, OH, Norfolk, VA, Los Angeles, CA, and Contoocook, NH.

EARLY LIFE: I was outdoors at every possible moment. I loved growing plants and biking, hiking, fishing, basketball, volleyball – you name it. If I had to be inside, I loved practicing piano or was always drawing, painting, coloring, or working on some sort of craft project. I loved making things and taking things apart to see how they worked, much to my father’s dismay.

PROFESSIONAL CAREER AND ACTIVITIES: I had planned to be a musician and music teacher, but after college discovered that teaching was not for me. I had worked at the Burman Classical Library as a graduate student at U. Cincinnati, so decided to try for my full-time library position outside of college at Old Dominion. That’s where I became seriously interested in librarianship. In the past, I’ve served on some ALCTS-AS committees have presented a few times at conferences. At present, I’m on the Instructor roster for the ALCTS Fundamentals of Acquisitions course.

FAMILY: I’m the youngest of nine children (5 girls, 4 boys), with 20 years between the oldest and myself. My parents both grew up in the county where we lived, so there were kind deep roots there – with cousins, aunts, uncles, and many family friends around. My parents were married for 64 years and seemed to know everybody wherever we went, so there was always a feeling of coziness within daily life – a memory that I will always treasure.

IN MY SPARE TIME: Practicing flute, cooking, gardening, genealogy, hiking, biking, the usual stuff.

FAVORITE BOOKS: It changes all the time. Today, I’ll say it’s Maybe the Moon by Armistead Maupin.

PET PEEVES: When people try to go into the elevator before letting those who are inside get out.

PHILOSOPHY: The Golden Rule.

MOST MEMORABLE CAREER ACHIEVEMENT: Moving the Music Listening Room at Old Dominion from the main campus library to a newly built branch facility across campus, and establishing music special collections services in addition to other new workflows, services, and programs. That was certainly memorable!

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HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I think that in five years we will all be somewhat disappointed at the slow progress that our profession has made in embracing change (e.g., linked data, killing MARC) but also some aspects of the profession will be recognizable to us in 2020.

KAY JOHNSON
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PROFESSIONAL CAREER AND ACTIVITIES: Lengthy career in cataloging, serials, and technical services.
Against the Grain / December 2019 - January 2020

Demetria Patrick
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BORN AND LIVED: Detroit, Michigan.

PROFESSIONAL CAREER AND ACTIVITIES: Demetria Patrick is the Technology/Systems Librarian at Northeast Ohio Medical University (NEOMED) where she is responsible for managing systems, cataloging, and emerging technologies at the Aneal Mohan Kohli Academic and Information Technology Center (Kohli Center).

She manages the integrated library system (ILS), which is shared with seven Associated Hospital Libraries, and ensures access to resources through the proxy server.

Ms. Patrick is currently leading the Emerging Technology Team on implementing Conversational Artificial Intelligence (AI) as a library resource that will provide instructional interaction. It includes setting up an ECHO Show, Smart bulb, and customized AI skills. Her hope is to continue to educate and encourage library patrons to engage with innovative technologies such as Smart technology.

Her newest role includes leading the mission of redefining, reconstructing, and renewing technical services in the Kohli Center.

Demetria has 15 years of experience as a systems librarian which includes nine years at NEOMED and six years at Hiram College library. She also worked two years at Miami University, in Oxford Ohio, as a Resident Librarian.

She received her B.A. and MLIS from Wayne State University in Detroit, Michigan and her MS in Information Architecture and Knowledge Management from Kent State University in Kent, Ohio.

IN MY SPARE TIME: I do whatever I am in the mood to do…relax, read, write, watch tv, sleep, etc.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I believe that librarians will continue to rethink what we want and need out of our Integrated Library Systems (ILS)/Library Services Platforms (LSP), especially in consortiums. My hope is that the industry will be innovative and think outside of the box. I have been imagining the industry realistically embedding emerging technologies such as AI in our future systems.

Amber Seely
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Harris County Public Library
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BORN AND LIVED: Native Texan.

EARLY LIFE: Amber is a second generation librarian and grew up in her mother's libraries helping her shelve books.

PROFESSIONAL CAREER AND ACTIVITIES: In addition to her position at Harris County Public Library, Amber also serves as an Adjunct Instructor of Cataloging at Texas Woman’s University, her alma mater. She is very involved in the Texas Library Association.

FAMILY: Amber's family includes a husband, a precocious daughter, 3 cats, and her parents who live near by.

IN MY SPARE TIME: Amber enjoys running, photography, reading, being a cat pillow, and spending time with her family.

FAVORITE BOOKS: Amber loves The Long Way to a Small Angry Planet by Becky Chambers, Ready Player One by Ernest Kline, Salt to the Sea by Ruta Sepetys, Stardust by Neil Gaiman, Country of the Bad Wolves by James Carlos Blake, and everything that Brandon Sanderson has ever written.

PHILOSOPHY: Always ask why.

MOST MEMORABLE CAREER ACHIEVEMENT: It is a dubious achievement, but I will never forget responding to 3 of our libraries that had flooded during Hurricane Harvey. I was proud to lead the team that rebuilt their collections and assisted with reopening them only 9 months after the hurricane.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: Libraries remain vital pillars of the community. While preferences for print vs. ebooks may change, and the technology certainly will change, our roles in developing early literacy, providing equal access to information and technology, serving as community meeting places, and providing adult continuing education will continue to be critical.
ATG Profiles Encouraged
from page 81

EARLY LIFE: Spent in San Diego, California, Tijuana, and Guadalajara, which gave me a view of how fluid language and culture is across national borders.

PROFESSIONAL CAREER AND ACTIVITIES: I have been a cataloger for almost all of my career and have worked with metadata, both creating it and maintaining it on a small- and large-scale.

FAMILY: Spouse, two children, and a cat.

IN MY SPARE TIME: I read and take walks.

FAVORITE BOOKS: The Brothers Karamazov, Our Animal Friends at Maple Hill Farm (a family favorite).

PET PEEVES: Decisions based on assumptions instead of data, observations, and empathy.

PHILOSOPHY: Honor all persons.

MOST MEMORABLE CAREER ACHIEVEMENT: Feeling the support and appreciation of my team.

GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW: Helping my team increase its already solid participation in national cataloging programs.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: The industry is so big – it’s hard to speak for all libraries and librarianship. In my setting, I see our research library growing more in areas that support interdisciplinary approaches to study and research, as well as internationalization. For librarianship and libraries as a whole, I hope that in five years we will have collectively made more real progress toward recruiting and retaining a workforce that is more diverse.

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Resource Description & Management
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PROFESSIONAL CAREER AND ACTIVITIES: I began my career in 2009 at Princeton University as the Islamic Manuscript Cataloger under a grant-funded project. I came to UNC-Chapel Hill in 2013, where I catalog materials in Persian, Arabic, Hebrew, and other Middle Eastern languages. I also work in Special Collections, where I am working on a project to catalog UNC’s collection of Renaissance and early modern European manuscripts.

Nanako Kodaira Thomas
Catalog Librarian for Japanese Language Resources
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Fax: (919) 660-9009
<n.kodaira@duke.edu>

BORN AND LIVED: Born in Japan but came to the U.S. as a high school exchange student in California for one year. After finishing high school in Japan, returned to the U.S. for more higher education opportunities and never left. Since then, lived in various states, including California, Wisconsin, and finally in North Carolina.

Cecilia Williams
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<Cecilia.Williams@hcpl.net>

BORN AND LIVED: Throughout Texas.

FAMILY: Husband, one son, and two tiny dogs.

IN MY SPARE TIME: I have either a hook or needle in my hands (crochet and knitting).

FAVORITE BOOKS: His Dark Materials by Phillip Pullman; anything by Gretchen Rubin.

PHILOSOPHY: Don’t make things harder than they have to be.

MOST MEMORABLE CAREER ACHIEVEMENT: Writing my first script to automate call number creation for a cataloging unit and the look of joy (and surprise!) in my coworkers’ faces.

Nikita Mohammed
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EARLY LIFE: Enjoyed winter sports, especially skiing; studied flute; excelled at English (e.g., translator at Peace Conference in Hiroshima).


FAMILY: A husband and two pre-/pre-pre-teen kids (one son and one daughter).

IN MY SPARE TIME: (If I have any!?) Play the flute, ice skate, watch comedies to relax.

FAVORITE BOOKS: Harry Potter series.

PET PEEVES: People walking around with untied shoes.

PHILOSOPHY: Make sure my cataloging helps people better locate materials.


GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW: Become fully CONSER authorized.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: Library silos will merge as projects will require more cooperation among units.

continued on page 83
**Background/History:** The William R. Perkins Library, Bostock Library and Rubenstein Rare Book & Manuscript Library comprise the main West Campus library complex, which is joined by Lilly and Music libraries on East Campus, the Pearse Memorial Library at the Duke Marine Lab and the separately administered libraries serving the schools of Business, Divinity, Law and Medicine. Together they form one of the nation’s top ten private university library systems. (From the Libraries’ “About” page: https://library.duke.edu/about.)

**Number of Staff and Responsibilities:** 251 full time staff members as of June 30, 2018 (latest data available at https://library.duke.edu/about/reports-quickfacts).

**Overall Library Budget:** $36,029,523 as of June 30, 2018 (latest data available at https://library.duke.edu/about/reports-quickfacts).

**Types of Materials You Buy (Ebooks, Textbooks, DVDs, Video Streaming Services, Databases, Other):** DUL acquires print books and serials, eBooks, eJournals, DVDs, Blu-rays, eBooks, eJournals, streaming, videos, data sets, GIS layers, manuscripts, realia, and likely more categories of materials.

**Does Your Library Have An ILS Or Are You Part Of A Collaborative ILS?** DUL has a vended solution for its ILS, which the separately administered libraries also use. DUL is currently working with partners on the FOLIO Project to develop and Library Services Platform.

**Do You Have A Discovery System?** Yes, DUL and uses TRLN Discovery, which was built with open source software, as its catalog. TRLN Discovery is a collaborative effort and also provides discovery of the collections at North Carolina Central University, North Carolina State University, and University of North Carolina at Chapel Hill. In addition, DUL uses Summon for web scale discovery of its resources.

**Does Your Library Have A Collection Development Or Similar Department?** Yes, DUL has a Collection Strategy and Development Department (https://library.duke.edu/about/depts/colldev/).

**If So, What Is Your Budget And What Types Of Materials Are You Purchasing? Print Or Electronic Or Both?** In June 30, 2018 (latest data), materials expenditures totaled $17,312,354 (https://library.duke.edu/about/depts/colldev/). Expenditures included both print and electronic resources.

**What Do You Think Your Library Will Be Like In Five Years?** The current Strategic Plan (https://library.duke.edu/sites/default/files/dul/pdf/DUL-Strategic-Plan-2016.pdf) provides insights into how DUL has evolved and will continue to evolve.

**Core Markets/Clientele:** Academic, Medical, Special.

**Number Of Employees:** Approximately 200.

**Harris County Public Library**

**Background/History:** The Harris County Public Library was founded 99 years ago to serve the rural communities outside Houston, Texas. In the beginning, there were shelves in general stores, train depots, and churches, and there was a bookmobile. Currently we have 26 branch locations and 4 mobile vehicles spanning the 1700 square miles of Harris County.

**Number of Staff and Responsibilities:** 395 staff members, including full and part time.

**Overall Library Budget:** $34 million.

**Types of Materials You Buy (Ebooks, Textbooks, DVDs, Video Streaming Services, Databases, Other):** Books, audiobooks, DVDs, magazines, ebooks, audiodbooks, evidoes, eMagazines, databases.

**Does Your Library Have An ILS Or Are You Part Of A Collaborative ILS?** Yes, we have Sirsi Symphony and we share it with 2 libraries, with 2 more joining us in the coming months.
DO YOU HAVE A DISCOVERY SYSTEM? Yes.
DOES YOUR LIBRARY HAVE A COLLECTION DEVELOPMENT OR SIMILAR DEPARTMENT? Yes.

IF SO, WHAT IS YOUR BUDGET AND WHAT TYPES OF MATERIALS ARE YOU PURCHASING? PRINT OR ELECTRONIC OR BOTH? 4 million dollars annually, covering print, electronic, and databases.

WHAT PROPORTION OF YOUR MATERIALS ARE LEASED AND NOT OWNED? For the physical collection – 0% are leased. For the digital collection, if you consider Metered Access and Simultaneous Use titles to be leased, then about 25%.

WHAT DO YOU THINK YOUR LIBRARY WILL BE LIKE IN FIVE YEARS? HCPL will continue to become embedded in more communities within the County via partnerships with other organizations and outreach locations.

WHAT EXCITES OR FRIGHTENS YOU ABOUT THE NEXT FIVE YEARS? Evolving service models to provide more local coverage within such a large geographic area is exciting because it is bringing us back to our roots from almost a hundred years ago, and it provides the opportunity to touch so many lives!

McConnell Library, Radford University
801 E. Main Street
Radford, VA 24142-6881
Phone: (540) 831-5364
Website: https://www.radford.edu/content/library.html

BACKGROUND/HISTORY: Radford is a public university founded in 1910 and the library is named for the founding president, Dr. John Preston McConnell.

TYPES OF MATERIALS YOU BUY (EBOOKS, TEXTBOOKS, DVDS, VIDEO STREAMING SERVICES, DATABASES, OTHER): We provide access to all of these, plus ejournals, a few print journals, and occasional special collections/archival materials. I’m assuming hosted subscriptions could be considered as “bought,” though some lack perpetual access.

DOES YOUR LIBRARY HAVE AN ILS OR ARE YOU PART OF A COLLABORATIVE ILS? Yes.

DO YOU HAVE A DISCOVERY SYSTEM? Yes.

University of California, Irvine
UCI Libraries
University of California
Irvine, Irvine CA 92623-9557
Phone: (949) 824-8938 • Website: lib.uci.edu

DOES YOUR LIBRARY HAVE AN ILS OR ARE YOU PART OF A COLLABORATIVE ILS? UCI uses the Alma/Primo VE products from Ex Libris.

DO YOU HAVE A DISCOVERY SYSTEM? Yes.

University of Maryland Libraries
McKeldin Library, 7649
Library Lane
College Park, MD 20742-7011
Phone: (301) 405-0800 • Website: https://www.lib.umd.edu/

BACKGROUND/HISTORY: The University Libraries serve 37,000 students and faculty of the flagship College Park campus in the University System of Maryland, the state’s public higher education system. [source: https://www.lib.umd.edu/about]

NUMBER OF STAFF AND RESPONSIBILITIES: As of October 2019, the Libraries employed 72 library faculty members, 102 non-exempt and exempt staff members, 35 colleagues on contract, 20 graduate assistants, and 276 hourly student assistants. [source, Office of the Dean of Libraries]

OVERALL LIBRARY BUDGET: $28.3 million. [source: https://www.lib.umd.edu/about]

TYPES OF MATERIALS YOU BUY (EBOOKS, TEXTBOOKS, DVDS, VIDEO STREAMING SERVICES, DATABASES, OTHER): Books, eBooks, DVDs, video streaming services, databases, print and electronic journals.

continued on page 85
DOES YOUR LIBRARY HAVE AN ILS OR ARE YOU PART OF A COLLABORATIVE ILS?  The University Libraries are members of a seventeen-member library consortium. The Libraries share ExLibris’ ALEPH ILS with the other consortium members.

DO YOU HAVE A DISCOVERY SYSTEM?  WorldCat Discovery.

DOES YOUR LIBRARY HAVE A COLLECTION DEVELOPMENT OR SIMILAR DEPARTMENT?  Yes.

IF SO, WHAT IS YOUR BUDGET AND WHAT TYPES OF MATERIALS ARE YOU PURCHASING?  PRINT OR ELECTRONIC OR BOTH?  $12.6 million per year, with over 90% of our annual budget per year on electronic resources, the majority of which are continuing costs, meaning journal and database subscriptions which are typically leased content.  [Source:  Director of Collection Services]

IS THERE ANYTHING ELSE YOU THINK OUR READERS SHOULD KNOW?  The Libraries welcomed its new dean, Adriene Lim, PhD, in August 2019.

University of North Carolina at Chapel Hill Libraries
208 Raleigh Street, CB 3916
Chapel Hill, NC 27515
Phone: (919) 962-1053  •  Website: library.unc.edu

DOES YOUR LIBRARY HAVE AN ILS OR ARE YOU PART OF A COLLABORATIVE ILS?  We have an ILS.

DO YOU HAVE A DISCOVERY SYSTEM?  Yes.

DOES YOUR LIBRARY HAVE A COLLECTION DEVELOPMENT OR SIMILAR DEPARTMENT?  Yes.

When Jonathan Swift presumed his tongue-in-check solution to the burden of poor parents abeying the starvation and poverty of their children in Ireland, it did nothing for said children.  If truth be told, it did nothing for those poor parents, either.  But like Swift, “I shall therefore humbly propose my own thought, which I hope will not be liable to the least objection.”  I also humbly add, I hope not with even the least ridicule.

For the majority of my career in librarianship, librarians have bewailed the cost of scholarly communication.  Indeed, they have underscored it with their utmost asperity.  It has come year after year, decade after decade.  And it doesn’t take a hawkwash to divine the yearly answer:  libraries must maintain scholarly communication at the risk of their own impoverishment.  That no one can afford the high costs of journals or aggregate databases is only underscored now by the more than two dozen Research 1 libraries that have cancelled the so-called “big deal” with publishers ranging from Wiley, to Springer, to Taylor and Francis, and even to Elsevier, the quondam Darth Vader of costly scholarly communication (https://bit.ly/2I9rZxG).  We librarians are, indeed, playing in our own exequy in the opera bouffe with publishers.

And frankly, it’s killing us (https://bit.ly/2CewS6U).  As the deals have gotten larger and more marginal journals have been added, libraries, facing sustained and, at times, strident cuts, can simply no longer afford these deals, even if they want to pay for them.  But why should we want to extend this worst-than-a-curate’s egg agreement?  The five and six figure deals threaten to cut libraries out of the academic mix altogether.  It’s no secret that libraries are a financial black hole.  With the growing cost of these big deals, and even the smaller ones, that black hole is looking more and more like an inevitable dead star.

It’s baffling, too, that we continue to play the poet maudit in this drama when you consider that, as I wrote elsewhere, conventional publishing Hoovers out research from our institutions of higher education, pays nothing for it, copyrights the materials for themselves in perpetuity, and then charges a fortune for that research to reappear in libraries on those same campuses where those faculty work.  An outsider who hears this calculus finds it ridiculous; we in academe not only find it normal, we often protect its survival.

But perhaps there is a way out.  Unfortunately, we must act quickly before this potential solution, this preliminary brouhaha, is monetized right out from under us.  Why not bring together our institution’s repositories, both large, medium, and small, for each of us to join?  These IRs stretch all across the country and even across the pond.  It would not take much effort to draw all of these together in the spirit of true collaboration, each of us sharing what our faculties are researching, and all for a very nominal cost.  While it’s true, the larger research institutions will contribute more, that is already true in conventional consortia.  Initially, we could group these IRs regionally to make the endeavor more palatable.  Failing this, should some think it too ambitious, we could agree among ourselves to spend a portion of our budgets on open access materials annually, thereby signaling publishers our concerns for the staggering costs and our seriousness in seeing an end to it.

Think of the return.  Thousands of IRs sharing their intellectual footprints for next to nothing.  First-rate research in the hands of students in universities everywhere and reducing costs to them significantly, because, let’s face it, scholarly communication is a chief but not the exclusive culprit in university cost escalation.

We need to act quickly, however.  Some of the monetization is already occurring with the giant publishers mentioned above trying to strike deals with various entities, the most recent of which was Elsevier’s acquisition of bepress [sic].  It’s only going to get worse as publishers and vendors that used to mock the open access movement are now sidling up to OA as it becomes more robust and less uncertain to libraries.

It cannot be doubted that in the beginning, this omnium gatherium of IRs would be less rich than the current aggregate database arrangement.  This is, after all, an idea whose time has come but very late.  Over time, however, as each of these IRs grew and matured, it might well be possible to cut the umbilical cord to publishers, if not completely, then significantly.

Tenure and promotion committees — one the main drivers of the madness we now suffer from — would need to retool and reassess what counts as scholarship.  Open access is not a vanity press, but it can be.  So can conventional publishing, especially in the more esoteric academic journals.  Given the recent hoaxes eurched at several peer review journals, one cannot argue that standard publishing is without its own inherent drawbacks (https://bit.ly/20Aze2C).  Retooling is going on now, and it is not an impossible task to consider.  In fact, it should have been done at least a decade or more ago.

It’s true that some repositories are now available in Google searches via Google Scholar, but they do not rise to the top of every search, and they are generally unknown to novice researchers.  What I am proposing here is an attempt to bring all of this copyrighted content from IRs together in one place for easy searching and distribution, printing, downloading and the like.  If such a database supplanted even one aggregate database like Academic Search Complete or its facsimile, the game would be worth the candle.

This is not a matter of razing on acquisitive publishers, though some might see it as that.  It’s an attempt to drive a knife into the heart of the current scholarly communication nexus and so assuage, if only a little bit, our crack-coke-like addition to the exorbitant cost of sharing with one another the scholarly communication that is already ours to begin with.  

Little Red Herrings — A Modest Proposal
by Mark Y. Herring  (Dean of Library Services, Dacus Library, Winthrop University)  <herringm@winthrop.edu>
The conversations that occur at the Charleston Conference are endlessly absorbing and it’s always both exhilarating and exhausting to make my way through the airports on the way home. This year’s preliminaries — Brewster Kahle, Patricia Brennan, Kumsal Bayazit, and the evergreen Long Arm of the Law — were just wonderful. (However does Katina manage to get Kenny Rogers to come back and sing for us every year?)

One of the things I realized this time was that everything we talk about at Charleston having to do with libraries and collections has meaning in various larger contexts and one line of my conversations made me realize that from my former and present lives I tend to think about some things that other folks aren’t as focused on, so I thought I’d muse here a little on one set of facts that define our academic world.

To hear the media tell it, of course, higher education is a shocking scandal, and nowhere more shocking than in the twin crises of competition and cost. The scandalous bribing of officials to get rich kids into “hot” schools spun all our heads around several times and is still on the front pages of the tabloids six months after the scandal erupted. And we all know that higher education is hugely expensive and driving people deeper and deeper into debt.

Now everything I just wrote in that last paragraph is true, but it’s not the whole story. Start here: those hotly competitive schools turning away students in droves? Their business amounts to approximately one quarter of one percent of the whole “higher education industry” in the United States. Those lucky institutions (I used to have a lot of responsibility at one of them) don’t need to worry about their revenue streams going south on them. The other 99.75% of students attend institutions that have no such assurances. That’s the fundamental story of American higher education.

And the cost (debt)? This is trickier. On the one hand, it’s a beautiful thing that money is made available to students on favorable terms — favorable rates, delayed start of repayment, etc. It’s made higher education possible for millions. But on the other hand, there are lots of students who struggle — and too often fail — to keep up with the payments. Yes, there are reforms possible that would ease that burden, both reducing default rates but, more importantly, making repayment less a burden on the early careers and family-making lives of graduates.

But let me ask you to ask yourself this question. Think of the public higher education institution you know best — you work at it, or it’s in your city, or you went to it, or your family sends young people to it. What do their graduation rates look like? Standard numbers that people track are freshman retention, four-year graduation rate, and six-year graduation rate for first-time, full-time first year students. The elite privates have great numbers: the last one I worked at had 96% freshman retention, 90% four-year graduation, and 95% six-year.

Bearing in mind that some students transfer out to other institutions and still graduate in a timely way, the numbers from the students’ point of view are actually somewhat better than that.

For comparison, the California State University system (all the “Cal State” institutions, not the flagships like Berkeley and Santa Cruz) has improved its systemwide four-year rate to 23%, up from 19% a couple of years earlier. Six-year rate is at 59%. So if you go to Cal State Fullerton or San Francisco State, on average you have a one in four chance of graduating in four years. Six years after setting out on the adventure of higher education, 40% of students haven’t got a diploma to show for it. That’s a huge investment of everybody’s time and effort — a huge amount of time those students have taken, when they could have gone straight to the workforce out of high school. Those numbers don’t make the front pages of the tabloids.

What’s this got to do with debt? Bear with me but: roughly speaking, the loan system is designed for the successful four-year graduate. Borrow the max, graduate in four years, have an average life career after that, and the system is designed so that your debt load will be repayable with modest stretching. Yes, even there, if you don’t quite optimize your career — illness, family obligations, economic downturn, bad luck — you’ve got a problem. But by and large, that system can work.

But what if you go to college, borrow money, and don’t graduate in four years — or at all? And borrow money along the way to keep the dream alive? And don’t make the dream? Then you’ve got a real problem. Your economic value hasn’t increased enough to make you a successful repayer of those loans — and you may have taken out more money over those six, or however many, years, in the hope of reaching the goal.

Now I know these things because I’ve been lucky enough to come to work at Arizona State University, where I am happy to say we have the best university president in the galaxy, Michael Crow. Our numbers could be better — 45% and 63% for 4 and 6 years respectively, and a freshman retention rate that is just touching 88%. But they are already vastly better than they were twenty years ago, and there’s huge internal effort to bring those numbers up, with innovative pedagogy, strong student services, data-driven advising. ASU’s university charter says that we measure our success “not by whom we exclude but by whom we include and by how they succeed” — and the internal management focus on supporting student success is intense and relentless.

Meanwhile, public higher education in particular has had billions of dollars of government funding taken away over the last couple of decades, in states that evidently don’t care about their own economic and social futures. Hard to fathom. The idea of free higher education is a beautiful one, but it’s obviously tough to achieve. But if states just stopped cutting and even, just maybe, restored some of what’s been cut, we have it in our power to make things easier for students.

Librarians: what’s in this for us? Everything we know says that students who draw on library resources perform better and graduate sooner. What are we doing to support, encourage, and enable that student success? If that question isn’t up near the top of your list of things that keep you awake, it should be.
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