# Technicalities™

Information Forum for the Technical Services Professional


## Reality Check

### Out with the Old, In with the New! Easier Said than Done

By Roxanne Sellberg

Roxanne Sellberg

How often have we heard or said it? "In order to develop and staff new services we have to stop doing some of the old." Fine as a slogan, but do many of us technical services leaders really walk that walk? In the absence of a budgetary crisis or some other clear game-changer, it is pretty easy to let the obstacles in the path of change stop us. We let our service operations and primary work flows keep on going with occasional technological or other efficiency-improving tweaks. Some of the flows are slowing to trickles on their own as we acquire fewer analog materials. In the meantime, we try to carve resources for new services and initiatives from around the edges slowly and in fits-and-starts.

Just what are those legacy services we should be eliminating anyway? As part of a planning retreat last year I asked a group of technical services staff that question. At first there was silence. Then I heard a lot about *other* parts of the library staff being mired in the past. There were also a few jokes about how to relieve ourselves of dreary tasks or disliked co-workers. Finally we got around to mentioning scarier topics: things that were part of our work, not someone else's; things that other libraries have eliminated but

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## Dollars and Sense

### How Much Cataloging Is Enough?

By Sheila S. Intner

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Once upon a time, catalogers felt obligated to provide separate catalog records for major works acquired by their libraries, regardless of how they were packaged. ("Major" was generally interpreted to mean a work that might well be issued on its own as a separate resource, not solely as part of a collection.) For instance, at the Library of Congress and elsewhere in libraries that served scholarly searchers, policy dictated that a sound recording that included

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# From the Editor's Desk.....

## Implications of Swets' Bankruptcy

By Peggy Johnson

**Peggy Johnson**

The burning topic among librarians in late September was the news that Netherlands-based Swets (Swets & Zeitlinger Group B.V.) announced its insolvency and was granted bankruptcy protection by a court in Amsterdam. Swets has more than 8,000 customers in 160 nations representing some 800,000 subscriptions, offices in 23 countries, and employs more than 570 people. As a result of the court decision, Swets is dismissed of its payment obligations to creditors (primarily publishers) for the duration of this arrangement. Most subscription renewals occur in September and October, meaning that libraries may have already made their payments to Swets, but Swets is not in a position to forward these funds to publishers. Both libraries and publishers will suffer.

Many librarians are experiencing a sense of déjà vu as they remember the demise of divine, inc. subsidiary RoweCom and its Faxon Library Services division, another giant in the subscription business, which failed in early 2003. At that time, *Publishers Weekly* suggested that "hundreds of academic and medical libraries and publishers are facing losses approaching $100 million in subscription fees."[1] While no calculations were made to determine the final financial impact, libraries experienced disruption and loss. They had followed the usual practice of prepaying subscriptions in the fall, but Faxon failed to pay the publishers in full. Some publishers honored subscriptions and they—in turn—lost money because they were providing issues without payment. Many libraries missed issues and scrambled to fill gaps; remember this was 11 years ago and many journals were still in print format. Libraries had to set up accounts with new serials management services, not a trivial task in the best of times.

Now we are in a very similar position, although the causes of the business failures differ and the outcome for libraries and publishers is not yet clear. The good news is that the Swets announcement came before many libraries made their advance payments for 2015 journal licenses and subscriptions. Several publishers have announced that they are extending their grace periods for payment into February and March 2015 and are promising to ensure that customers retain access to content. Even if libraries and publishers are not out money, both will face the complex process of setting up new

subscriptions through a different agent.

Prepaying tens of thousands and often millions of dollars in advance for a product or service can seem a bit strange to those outside libraries. Many years ago, the University of Minnesota Libraries had an interim university librarian who came from an academic department. Part of my responsibilities was to explain what we then called the serials crisis and the need to cancel titles in the summer and early fall while guessing about how much money we would have available and what the increases would actually be. He asked why we could not do what individuals do—cancel a title part way through the subscription and get a refund for the remaining portion of the year. If only we could!

I think many librarians doubted we would experience another collapse of a major player in the content access, management, and delivery business. Nevertheless, we have tried to be responsible stewards of our resources and avoid risk. Most libraries are very cautious when issuing a request for proposal (RFP) for a new serials agent. RFPs usually require respondents to provide copies of their financial statements, report if they are currently for sale or involved in any transaction to be acquired by another business entity, give details of all past or pending litigation, and supply any additional information about their financial stability. Unfortunately, Swets' annual report for 2013 (the most recent report) only became available in August.[2] One telling sentence in the report states, "Since Swets Group is currently unable to fulfill such potential demand [for immediate repayment of outstanding loans], there is a material uncertainty regarding the continuity of Swets Group and its subsidiaries."

The consequences and complexities of Swets' bankruptcy are similar yet different from those surrounding the Faxon collapse. As Steve Kelly tells us in this issue, the distinctions between serials and other formats are blurring. Many former "serials agents" now handle more than serials. Swets, for example, offers more than one million e-books and manages licenses for both e-serials and e-books, and all require prepayment on an annual basis. The investment on the library side can be huge and the financial loss debilitating.

Some suggest now is the time to rethink the old model of paying for serials a year in advance, a model that is based on the print environment. Might libraries pay quarterly or even monthly for online-only access and the services that agents provide? Might libraries be charged after the fact for content used and services rendered? Such an approach would require both publishers and agents to rethink their business models, something libraries have been advocating for several years without much success. Perhaps dealing with fallout from the Swets bankruptcy will add greater urgency to developing a mutually acceptable solution.

## References

1. Norman Oder, "Faxon Failure May Cost Libraries, Pubs $100m," *Publishers Weekly* 250, no. 1 (Jan. 13, 2003), www.publishersweekly.com/pw/print/20030113/37963-faxon-failure-may-cost-libraries-pubs-100m.html (accessed Oct. 2, 2014).
2. Royal Swets & Zeitlinger Holding N.V., *Annual Report 2013*, www.swetsinformationservices.com/sites/default/files/reports/en/Royal%20Swets%20%26%20Zeitlinger%20Holding%20NV%20Annual%20Report%202013.pdf (accessed Oct. 2, 2014).

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two symphonies, each of which also could be issued alone, was given two records—one for each symphony, with a connecting link from each one to the other known as a "with" note. Similarly, if an anthology contained two or three novellas, each novella got an individual record, neatly linked by the "with" notes. The underlying logic was that library users were likely to seek one symphony or one novella, not the combined book or recording, even if it had its own title. This kind of cataloging was called "analysis" or "analytic cataloging," and the records and their access points were known as "analytics." A whole chapter in the first part of *Anglo-American Cataloguing Rules*, second edition, covered their description, while a series of rules in the second part of the code dictated how their access points were to be chosen and expressed.[1]

As you might imagine, there was a limit to how far catalogers were willing to go in identifying individual works that happened to be packaged together. An anthology titled *One Hundred Best Loved Poems of the American People* did not get 100 catalog records, and even a mere fifteen or twenty short stories by various authors in an anthology did not get 15 or 20 records, despite the logic that catalog searchers rarely wanted the whole anthology but only one or more of the individual stories. If the anthology had its own title, like the poetry collection named above, it was usually considered enough to consider it one collected "work" to be given a single catalog record. If not, this was a golden opportunity to apply the cataloging "Rule of Three," in which anthologies containing two or three works might be cataloged analytically, but those containing more than three were not. Individual libraries might decide to go further and make it a policy to do analytic cataloging for four, five, or more works, but they were going beyond expectations.

### Complicating Technologies

When books and other printed materials comprised the lion's share of library collections, dealing with anthologies had a low priority, because they constituted a very small proportion of a library's entire collection. The advent of microforms changed that. In the 1930s, the Library of Congress began employing microfilm—a technology launched in the 1800s and applied to document storage at the beginning of the 20th century by Paul Otlet (he of Universal Decimal Classification fame)—to conserve shelf space by putting selected books on film. The idea caught on quickly. An Internet search for "microfilm sets" yields numerous hits, each of which represents thousands of individual resources on film. Publishers recognized that a market existed for collected groups of resources—back issues of periodicals, dissertations, historical pamphlets and other documents, foreign language books, Old English language books, and all sorts of other resource sets—that could be copied onto microfilm and issued together on reels of film. Research institutions, always short on storage space, bought the sets by the dozens. Entire departments devoted to microfilms arose within libraries. These departments had staffing of their own, floor space of their own devoted to housing rows of projectors and cabinets of films, and, sometimes, catalogs of their own. Librarians debated about how best to provide access to the thousands of individual offerings now collected on film that they were buying.

In some instances and for some microfilm resources, reference tools were issued to give access to the individual parts, the way periodical indexes had been doing for a long time. So long as a library that purchased microform sets also obtained those indexes, it was not a difficult job to locate individual parts, although it meant the searcher had to do two look-ups instead of one. For example, if a searcher knew she wanted a particular journal article, she could look it up in the periodical index to learn which issue of what journal it was in, and, then, look up the microform holdings for that journal in the library's catalog to find the number of the reel for that journal on which it appeared.

Despite the additional work of locating a particular work on microfilm, the medium had multiple advantages: it saved space—always a problem for research libraries; it preserved content; and it enabled libraries to obtain complete sets of back issues of journals and other large document groups with relative ease.

### The Age of Implosion

Two trends began to erode the efficacy of the divided cataloging process in which the publishers of reference tools provided information for individual works within collections while local library catalogers, if they did any work on such resources at all, merely cataloged the collections *qua* collections. First, toward the end of the 20th century, librarians recognized that old books published on acidic paper were self-destructing as they sat on

library shelves. Before long, efforts to save them involved microfilming projects, which called for new cataloging for the preserved resources. This was happening at a time when catalog departments were shrinking and library directors were trying hard to eliminate cataloging staff. Second, at the turn of the 21st century, computers and rise of the Internet opened up new ways to issue and distribute collections of filmed resources as well as large numbers of related resources such as (but not limited to) periodical issues and dissertations originating in any medium, especially print on paper.

Digitizing resources could make them instantly available to anyone with the required equipment and access if the information needed for discovery (aka metadata—the equivalent of cataloging for online resources) was provided. In the rapidly expanding field of digital information, what kind of metadata was needed and how to provide it became Big Issues. One of the problems for libraries was that they constituted a small proportion of the exploding digital world and providing bibliographic products that met library standards was not a prerequisite for publishing digital collections.

In some instances, the document digitizers were libraries; in others, they were publishers; and in still others, they were neither, just individuals or entities that decided to gather and encode material, and put it out on the Web. The library-digitizers recognized the importance of cataloging, but often could not provide it, either because their cataloging departments had eroded to the point where they could not handle the work or because the department that did the digitizing was totally isolated from other library departments, including cataloging. The publisher-digitizers also knew about the importance of cataloging and/or metadata, but preparing and including it along with the information they were issuing was not necessarily a priority, since their traditional model was to issue discovery tools in a separate publication and that was often done by a different publisher. There was another major problem: digital information, unlike information in books or sheet music or videos, etc. (known generically as analog information), was one with its metadata. Digitization united both cataloging/metadata and the information it represented. If a searcher found the metadata, he or she also found the information it represented. Searchers did not have to go, physically, to another place, such as a book or a microfilm in a library, to obtain the information they wanted the way they did with analog resources. All they had to do was click on a "full text" link and they had the whole collection. Enter the Age of Implosion.

## Coming Full Circle

Now, given the penchant of libraries to acquire gobs of e-books combined in huge offerings, we seem to be reverting to a need for the original policies dictating that major works of prose, music, etc., should be cataloged analytically so they can be searched and retrieved individually in the library's catalog.[2] The issue is who should provide this analytic cataloging. If library catalogers are the ones creating metadata for these digital collections (and some libraries are already using the term "metadata" to refer to all their bibliographic products), they have to consider doing analytic cataloging to provide access to major works contained within them. It would be much nicer and far less trouble (to say nothing of the cost) if the issuers of the collections provided the metadata to go with them, and sometimes they do. But, when metadata is absent, metadata librarians (*née* catalogers) should be ready create it.

Some library directors believe that if digital collections are not actually owned by the library that subscribes to them—like a rental car, subscribing to a digital collection makes it available for a limited length of time and goes away when the subscription ends—the library has no obligation to catalog them. On the other hand, what is the use of paying for the subscription if the library's public cannot use the same catalog it uses for other library resources to find the works it contains? And, as difficult as many people find it is to use their library's catalog, how much more difficult is it if they are faced with having to scroll through huge numbers of titles or citations? Given large numbers of entries, even being able to limit a search to a letter of the alphabet, which is the way many websites divide entries in a large database, would not make it easy enough for a lot of people.

In order to fully exploit digital collections, librarians need to consider going back to analytic cataloging. Call it "analytic metadata" if that sounds better to your ears, but should we not do enough cataloging to enable library users to find a major work they want if their library has purchased access to it for them? As more and more library users jump into the pool we have built for them, is it right to let them sink or swim on their own? Should we not give them enough cataloging to find what

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they're looking for, not merely what we believe tradition obligates us to provide?

### References and Notes


1. *Anglo-American Cataloguing Rules*, 2nd ed., 2002 rev., 2005 update (Chicago: American Library Association; Ottawa: Canadian Library Association; London: Chartered Institute of Library and Information Professionals, 2005). Perhaps it was no accident that the chapter covering analysis was chapter 13, an unfortunate number that inspires fear and loathing among otherwise sensible people, and is often missing from tall buildings.
2. In a chapter titled "Collaborative Batch Creation for Open Access E-Books: A Case Study," authors Philip Young, Rebecca Culbertson, and Kelley McGrath describe a collaborative effort to provide individual catalog records to the 4,000+ e-books in a free offering from the National Academies Press (NAP). In *Cataloging Collaborations and Partnerships*, edited by Rebecca L. Mugridge (London and New York: Routledge, 2014), 102-117.


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we are still doing; things that staff like to do and get satisfaction from, but that might not be as necessary as they used to be; changes that could have an actual impact on our ability to meet exciting-but-frightening new challenges.

I am going to discuss eight of the most significant suggestions, along with some obstacles that might be allowed to stand in the way of implementation. Readers who have already crossed some or all of the described bridges may enjoy looking back (or may want to offer help; please contact me at sellberg@northwestern.edu). Readers whose libraries are still engaged in these suspect activities may benefit from a review of the opportunities and pitfalls.

### Some "Legacy Service" Nominations

*Gift-in-kind processing* may include pick-up, transport, unpacking, sorting, donor acknowledgement, deed-of-gift negotiation, valuation referrals, selector review, book sales, and disposal of unwanted or unsold items. The case against: The amount of staff time that goes into these processes is shockingly out-of-proportion to any possible benefit. With the rare exception (of a rare or unique item), collections are not much improved by gifts-in-kind; the positive public relations impact is never very significant, and occasionally libraries deal with public relations disasters connected with accepting or disposing of gifts-in-kind.

*Decentralized collection fund management* is the assignment of specific budget amounts for purposes of controlling and tracking expenditures for materials to support academic units or other user constituencies. Individuals are accountable for making selection decisions that spend, but do not overspend, these budget amounts each year. The case against: The amount of staff time needed to manage the collection budget this way is outrageous, especially for subject specialists but also for acquisitions and business office staff. Highly balkanized budget management is also out of step with the interdisciplinary nature of 21st century scholarship and publishing.

*Title-by-title collection development* encompasses protocols for making and carrying out decisions about acquisition, shelving location, interlibrary lending, preservation treatment, replacement, transfer to storage, and withdrawal of individual titles or even individual pieces. The case against: The risk associated with the "wrong" decisions being made about specific books is minimal and much of this staff time would be better spent on other priorities. Tools for parameter-based or demand-driven acquisitions, for usage tracking, and for collection analysis would result in good enough (if not equally good) management of collections at a fraction of the staff time cost.

*Serials check-in and issue tracking* includes activities necessary to predict, monitor, and record the arrival of individual issues or volumes ordered by subscription for the purposes of updating holdings information and triggering claiming activities when expected items do not arrive. The case against: As paper-based serials acquisition rates decrease and the availability of online journal content expands, issue-level management of periodicals and journals cannot be a high priority for most libraries. Check-in does not prevent missing issues and there are

other ways (such as the creation of item records) to present holdings detail.

*Copy cataloging* has been such a favorite topic in the cataloging community for decades that it hardly seems necessary to reiterate. It is the process of inspecting metadata created by someone else and modifying it to improve accuracy, completeness, and adherence to local standards. The case against: While it does not take nearly as long to check over and modify copy as it does to create original metadata, it takes longer than trusting the work of the original cataloger and moving on. Multiply the time it takes by thousands of titles in thousands of libraries and we are talking significant staff time that could be reassigned.

*Shelf listing* is consulting (usually online) the array of call numbers for materials already in a collection in order to assign the best possible unique call number to an incoming addition. The case against: unique call numbers are no longer necessary for inventory control in libraries that use barcodes or other item-level inventory control mechanisms. Few, if any, library users pay much attention to the exact order of books on library shelves. Without tolerance for duplication or funky collocation, it is difficult to take advantage of shelf-ready services.

*Subject heading assignment* means adding access points based on a controlled vocabulary of subject terms to catalog records. The case against: Originally designed to provide subject access in the card catalog context, the LC subject headings have outlived their usefulness. Key word searching is commonly available for full text content as well as for metadata. Libraries also often use classification numbers to indicate subject content. Other priorities call for the skilled staff time currently used to provide a third kind of subject access.

*Library-specific online public catalogs* requires creating, maintaining, and presenting a database of records about information resources that are owned, held at library locations, or otherwise identified as part of a library collection. The case against: The time has passed when libraries acquired, controlled inventory for, and could provide immediate physical access to all the information resources in their collections. The definition of library collection is a moving target that our users should not need to understand or care about. Better to devote resources to helping link potential library users with a broad range of resources by way of ubiquitous general purpose discovery systems like Google.

## Obstacles to Change

The above summaries are unapologetically one-sided. Each asserts that eliminating the service is the right thing to do. I am not sure I believe that myself for all eight suggestions, but for the sake of argument let us assume that the great decider in the sky likes them. Even an endorsement from on high does not ensure local consensus and in some organizations local consensus seems necessary to move ideas from "maybe" to "yes." In my experience, the obstacles in the path of a decision to stop something fall into these categories. Any of the following sound familiar?

"But we don't know how not to." This is usually the first obstacle encountered; often we do not get past it. The idea of eliminating something seems absurd, if it is not combined with a notion about how life would go on without that thing. "If we say we no longer accept gifts-in-kind, what happens when . . . ?" "How can a library just not have a local catalog?" Some leader with perseverance and credibility has to be able to answer these immediate questions. It helps to be able to prove that some other library did it and the staff lived to tell the tale.

"But users will suffer." All the above services avoid or solve some kind of problem, enhance the discovery or use of some kind of information resource, help library staff members do parts of their jobs, or are thought to enhance the library's reputation in some way. It is difficult to pull the trigger on a change that we know will be disadvantageous to some users. It is particularly hard for the folks who have to face those users directly across service desks or in research consultations. Wanting to "do no harm" to the few who we know, we fail to do good for the anonymous many.

"But *they* won't let us." In the case of technical services, it is usually the subject specialists or the public services staff that we are sure will thwart any attempt to reduce traditional services. That is certainly the fear with regard to changing fund management and title-by-title collection decisions. Less often, some other powerful veto-wielder is involved. For instance, concerns of an internal auditor might prevent a university library from stopping serials check-in if it meant that missing issues would not be tracked and claimed.

"But that leg bone is connected to . . . ." It can be difficult to change one policy or procedure without affecting multiple other things. The best idea might be abandoned if it seems impossible to pursue without

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opening multiple worm cans. Shelving operations would have to be revamped, for instance, if duplicate call numbers became an acceptable norm rather than problems to be immediately reported and solved. The requirement that some gift, grant, and endowment money remain tied to specific topics or genres would complicate the task of devising a simplified system for managing collection money.

"But who will I be if not what I am?" Contemplating some significant service changes, individual staff members may face the loss of their primary work assignments. This is difficult, even in situations where the duty to be eliminated is unloved and reassignment to some interesting new work is assured. It is worse when the work to be given up is personally rewarding (like copy cataloging can be, for instance) and the prospects for the future work are not well defined. An individual's fear of change, by itself, usually does not block the elimination of a service. The fear of a many individuals, however, can make it more difficult to get past the other obstacles mentioned above.

### Choose Your Battle, Prepare for a Draw

These obstacles are not insignificant and there is no immediate or direct reward for trying to fix things that are not broken. It is tempting just to forget about trying to give up legacy operations. I am using the experience of organizing this column to fortify my resolve not yield to that temptation as my library embarks on another round of reorganization and strategic planning.

Instead of lecturing my colleagues about the biggest or most problematic of the legacy services (decentralized fund management, title-by-title collection decisions, and the local catalog), however, I am going to focus next on a few areas where the chances for near term change seem the best. I have decided that, for me at this time, the highest possibility for some success will be in efforts to curtail gift-in-kind processing, shelf listing, and copy cataloging.

I say "some success," because I think that compromise will be the inevitable outcome of any attempt to give up these activities. My strategy for pursuing these ideas will be to pair the reduction of each set of "old" work to a specific benefit. Less time spent on gift processing work will surely, though perhaps indirectly, translate into more electronic resources management work getting done; less time spent on selecting perfect call numbers should translate into faster progress from loading dock to shelf—especially if the change enables us to engage a shelf-ready service; less time spent on copy catalog will translate directly into more time for archival collection finding aids and other non-MARC metadata projects.

Good luck in your own efforts to identify, examine, and decide about legacy technical services at your library.

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## Interfaces

# A Summer Offering

By Jean Weihs

**Jean Weihs**

Those of us who live in Canada and the northern United States had a ghastly winter, a time suited to staying indoors doing research and investigating serious subjects. I am writing this column on a lovely summer day looking through my clipping file for interesting items that do not require extensive study and a trip to research collections housed in faraway buildings. I realize it may be winter when this article reaches *Technicalities*' subscribers, but please think of warm summer breezes when you read it.

Some of the following "old" items were held in a just found file of clippings stored in an unlikely place. I hope they entertain.

### Additions to Past Columns

A five-part series on the history of classification was published in the 2010 issues of *Technicalities* and in a slightly condensed version in *The Whole Library Handbook*.[1] Since

writing these articles, I have read about another Dewey-like classification. Many Masonic lodges have a library with a mandate to collect material on any aspect of Freemasonry.[2] The librarians found the traditional classification systems inadequate, so in 1915 William Boyden, the librarian for the Scottish Rite, Southern Jurisdiction, based at the Temple in Washington, D.C., created a classification scheme with a Dewey-like structure to cover all topics associated with Freemasonry.[3]

Many *Technicalities* readers will know about the recent change to the Library of Congress classification for juvenile fiction. Just in case you missed it: "Authors who began to publish in about 1870 through 2014 will continue to be classed in PZ7. Authors who begin to publish in 2015 and later will be classified in PZ7.1. There will be two alphabetical arrangements of authors, one in PZ7 and the other in PZ7.1, but the works of each individual author will be collocated."[4] Title work marks will be used in association with PZ7.1.

School librarians interested in exploring an alternate classification system for elementary school libraries might be interested in reading an article about a school librarian's homegrown student interest-based classification system called "sur-F!" (See. Use. Reshelve. Fast!) listed in "References and Notes" following this article.[5] In addition, I found a note reminding me to look at the May 4, 2011, issue of *ALDirect* for an article titled "To Dewey or Not to Dewey: Libraries Go Dewey-Free." There is no *ALDirect* issue with that date. I then Googled the title and found several different items with this title or one similar to it, but not one that I could clearly identify as the one I was seeking. As young people say—my bad!

In 2009, my column discussed the history of shelving.[6] In that article I mentioned at one time books had been shelved with the paper edge of the volumes facing outward. Since that article was published, my attention was caught by two articles dealing with this way of shelving books. Stephanie Sylverne tells us the reason for shelving books with their paper edges out happened in the days when books were valuable objects.[7] The books were made even more valuable by having their pages gilt-edged to demonstrate the wealth and prominence of the owner and, of course, these gilt edges needed to be seen. Another way of indicating this social status was to commission artists to do a painting on the paper edge. Adding value to the paper edges of books probably meant the books were not read—careless handling might deteriorate the gilt or the pictures. In the present day, the idea of books stored with page edges facing outward is, in my opinion, bizarre; one interior decorator recommends this in order to achieve "a neutral look."[8]

I have written several columns about theft in libraries. This one does not really fit into the category of theft, but it is considered a crime in most (all?) jurisdictions in North America. A woman was arrested for performing a sex act for money in a New England public library. A year previously, a man was arrested after posting a Craiglist ad offering sex in a library's bathroom.[9]

An addition to my column "The After Life of Books and Shelves," has been provided by Henry Petroski's book—"Instead of the usual rectangles of cloth or textured weaves of grass [as place mats] there were art books opened to a two-page spread of color and composition. . . . Whether the books were shaken out and reshelved after the dinner party, I do not know. Perhaps, any soiled pages were disposed of."[10] I have more questions. Did enjoyment of the art detract from the enjoyment of the meal or vice versa? Were thin books chosen so that there would be no valley between the left side and the right side pages where plates full of food could tip? Would a drip of salad dressing or a spot of grease change the art work? I could go on and on.

## This and That

This is probably not a problem for most North American libraries, but one that could affect media collections in warm, moist climates. In 1999, Victor Cardenes, a Spanish geologist, stumbled across a fungus in Belize that was eating a CD. He took the CD to scientists at the Consejo Superior de Investigaciones Cientificas (Superior Council for Scientific Research) in Madrid who reported that the fungi had burrowed into the CD from the outer edge and gobbled up the thin aluminium reflecting layer and some of the polycarbonate resin that makes up the bulk of the disc. Biologists identified the fungus as a previously unknown species of the common Geotrichum genus. The fungus stopped growing in the cooler, drier weather of Madrid.[11]

In 1995, the University of Western Sydney, one of Australia's largest universities, buried 10,000 library books under 2.5 metres (8.2 feet) of soil next to a cricket field in order to save money on storage costs. The administration claimed they were unable to find

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a company that would cheaply pulp the books and the university opted to use them as landfill on the recommendation of a former librarian who made the decision to bury the books. Included with the buried books were first editions and rare 100-year-old texts. When the books were dug up in 2000 with the help of students, attitudes had changed. A university spokesperson said "instead of storing them, which would have been most appropriate, some idiot got rid of surplus books by burying them."[12]

In the late 1990s during lunch at a conference a Russian librarian, who I had met on previous occasions at library meetings, told me that at one point during Stalin's tenure of power, the librarians, fearing the destruction of materials in the library which the Stalin government might consider subversive, carefully buried them in the middle of the night. After Stalin died and the fear of repression had lessened, the books were retrieved from their burial plot and returned to the shelves.

Weeding has always been problematic for libraries and more acceptable for public libraries than research libraries. Will Manley wrote his usually insightful and amusing column about weeding in a public library. "There is only one thing to do with discards. Fit them with cement dust jackets and truck them down to San Francisco Bay in the middle of the night—when Nicholson Baker is sound asleep."[13]

Théophile-Jules-Henri Marzials (1850-1920) started his work at the British Museum as a junior assistant in the Librarian's office. His only published collection of poetry, *The Gallery of Pigeons and Other Poems*, contained the poem "A Tragedy," which has been cited in several works as the worst poem ever written.[14]

Librarian trading cards—a great idea, but did any other library do something similar? "The reference staff at Carleton College in Northfield, Minnesota, hit upon the idea of trading cards that identify each of their subject specialties, along with contact information and favorite reference books. The set of four cards is handed out in instruction classes, at the desk, and at faculty picnics. Humanities specialist Heather Tomkins said so far none have turned up on EBay."[15]

### Things I Have Missed

In 2001, an OLAC electronic discussion list contributor asked a question about the correct term that should be used to describe a book with buttons, which, when pressed, "read" the text of a page or pages aloud. It appears the questioner received no responses, so I googled the term "button books" and found this term was only applied to books about buttons that one sews on clothing. It appears that books with buttons that can be pressed for sound are still available, but without a special name that I could find. In my long career I have never seen one even though I spent three years cataloguing materials for the libraries in a school district during the late 1960s. Probably these books were marketed in later years.

I have attended many, many American Library Association conferences in my 61 years of librarianship, but I appear to have missed book cart drills. "What sport demands the precision of synchronized swimming with the book smarts of a librarian?" The answer: book cart drills. "The activity was popularized in the mid-2000s by Demco, the book cart manufacturer, which sponsored a world championship competition at the American Library Association's annual conference for several years."[16] Sounds like fun! Maybe this activity can be promoted to an Olympic sport!

### Library-Related Ephemera

Stalag Luft III, a German prisoner-of-war camp for captured American, British, Canadian, and other nations' air crews had a library that held 10,000 books.[17]

In 2004 the Iowa Library Association published *Dewey or Don't We?: Librarians Cook*, a cookbook in which the 374 recipes were arranged in Dewey decimal order.[18]

The most borrowed books from the University of Toronto Libraries in the last five years are *The Psychology of Prejudice* by Todd D. Nelson (2006) and *Constitutional Law of Canada* by Peter Hogg (5th ed., 2007).[19]

***A librarian's life is the life for me***
***For there's nothing at all to do, you see***
***But to sit at a desk and read new books***
***And admire yourself, and think of your looks***
***To questioning souls one can tartly say:***
***"I can't be bothered with you to-day,***
***For I haven't finished this novel. See?"***
***A librarian's life is the life for me.***[20]

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# Continuities

## The Serialization of (Just About) Everything

By Steve Kelley

Steve Kelley

Recently, as part of a profile in the newsletter of the organization for serials specialists NASIG (full disclosure: as of this writing, I am the current President of NASIG), I was asked what changes I see for serialists over the next five years. After giving it a good deal of thought, I said that I thought that we will see more library resources that are not traditionally defined as serials becoming more like serials in important respects. Furthermore, I added that I believe that during the next five years, serials specialists will be brought in more and more to assist in figuring out how to manage these increasingly serial-like (serialized?) resources, because serials specialists understand how to manage the acquisition of resources that are paid for by subscription and also understand how to describe resources that change and add content over time, as do serials. I thought that I would expand on this idea for this "Continuities" column.

### The History, Or When Serials Were Serials and Monographs Were Monographs

One does not have to go very far back in the past (say, twenty or so years) to remember a time when serials were serials and monographs were monographs and ne'er (or at least, rarely) the twain shall meet. Yes, there were the occasional exceptions. Monographic series, while obviously being primarily monographs, also have a number of serial-like features. Series have a title that runs across multiple parts, they usually have numbered volumes, and they are often acquired by libraries on standing orders, just like a variety of serial publications, such as directories and yearbooks.

Another long-standing type of library material that has shared monographic and serial features is the category of loose-leaf publications. These publications, which are usually made available to the public in three-ring binders, contain material that is frequently updated (very often sets of laws or rules that are revised with some regularity). Libraries purchase subscriptions to the loose-leaf updates and the material is interfiled in the binders, replacing pages where the material is now outdated. The subscription component to acquiring loose-leaf updating materials is a definite serial-like feature, but the initial material has always tended to be purchased as a one-time monograph. Loose-leaf publications used to present unique problems for the bibliographic description of these materials. Before the advent of the continuing resources format that takes the special features of loose-leaf publications into account, these publications were stuck in limbo, neither fish nor fowl. Some libraries cataloged them as monographs, others cataloged them as serials, and neither bibliographic approach fully described the unique features of loose-leaf publications.

Of course there were several other troublesome categories of materials that blurred the lines between the monographic world and the serial world, such as serial supplemental materials (especially things like CD-ROMs) and both print and microform reprintings of journals, magazines, and newspapers, but the two major categories of overlap between monographs and serials were monographic series and loose-leaf updating publications. Outside of these few trouble spots, twenty years ago monographs were monographs (each work was published, described and purchased separately), and serials were serials (each work was published in parts over time, described as having multiple parts, and was generally purchased through a subscription). That all changed with the emergence and explosive growth of internet-based resources.

### The Increasingly Serials-Like Nature of the Acquisition of Monographic Materials

The development of electronic bibliographic materials available through the Web has lead to changes both great and small in the processes libraries use to acquire and describe a wide variety of resources that, in older models,

would have been rather straightforward monographic resources. The processes used to acquire and describe these relatively new Internet-based bibliographic resources have significant features that are similar to the processes used to acquire and describe serials. I will begin my discussion of the ways in which monographs have become "serialized" by examining some of the changes to acquisitions processes brought about by the development of electronic resources.

One of the major changes to the acquisition processes used for monographic resources that makes these processes similar to those used for serials is undoubtedly the licensing of electronic resources. In the 1990s, with the emergence of electronic journals, serials specialists started working to become familiar with the legal niceties and problems surrounding publisher licensing agreements. These publisher licensing agreements were (and remain) necessary to define the terms under which libraries can purchase access to electronic serial resources. Fifteen to twenty years ago, many serials librarians had to quickly educate themselves in the basics of contract law in order to be able to provide access to electronic journals to their patrons. More recently, the explosion of electronic book packages and the development of streaming video plans, both of which rely on publisher content licensing to regulate access to these materials, has brought licensing concerns front and center for many, if not most, monographic acquisitions librarians. The problems and issues related to content licensing that were formerly the nearly exclusive province of serials specialists have spread to the monographs realm.

In addition to the licensing of access to electronic monographic materials being similar to processes used in acquiring serials, the phenomenon of paying for access to electronic materials repeatedly over multiple years parallels the long-standing practice of subscribing to serials. Of course, electronic databases have been purchased by libraries through subscriptions for a number of years, but this is still only a relatively brief period when one considers how long print serials have been purchased through subscriptions. In addition to electronic databases, a wide variety of electronic resources have, in recent years, become available to libraries through licensed packages that are paid for annually. These resources include text electronic monographs, electronic audio books, and streaming video. As they have to be paid for on an annual recurring basis, they are materials purchased on subscriptions, and serials librarians have been dealing with the quirks of subscriptions for many, many years.

The development of the demand-driven (DDA, also known as patron-driven) access model for electronic monographs presents some interesting features in the "serialization" of electronic monograph acquisitions. In a DDA access situation, a library pays an annual fee to a publisher and is sent a batch of bibliographic records for electronic monographic resources, which include URLs linking to the sources themselves. The library loads these bibliographic records into their local catalog and each time the patron accesses one of these electronic monographs, the library is charged a rental fee. After a set number of uses (often no more than five) of a particular electronic monograph, the library will purchase it permanently. So, the DDA monographic acquisitions model is blend of subscription, rent-by-use, and permanent purchase.

## The Increasingly Serials-Like Nature of the Cataloging of Monographic Materials

Not only have the acquisitions processes used to purchase access to electronic monographic resources become increasingly similar to the processes used to purchase serials, so too have the cataloging practices used to manage the discovery of electronic monographic resources become increasingly similar to the practices used in the cataloging of serials. I will discuss three aspects of this trend: the batch loading of bibliographic records, the ongoing editing and maintenance of bibliographic records, and wrestling with the question of using a single record or separate record approach in cataloging electronic resources.

The practice of batch-loading bibliographic records into local catalogs has been around for quite a while and has been used for formats other than serials. Many libraries have batch-loaded catalog records for microform materials and government documents for years. However, I would argue that ten to fifteen years ago, it became very common for libraries to maintain their collections of electronic serial resources through batch-loaded records purchased from commercial services.

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## The Serialization of (Just About) Everything

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The bibliographic records for these electronic serial resources needed fairly regular updating and editing and were simply tinkered with more often than the batch loaded records for other types of materials. I think that this model of more frequently updating batch loads characterizes the bibliographic practices used to provide discoverability and access to electronic monograph resources. The rapid proliferation of packages of electronic resources (text monographs, audio monographs, streaming video, etc.) has greatly increased the frequency of bulk loading of bibliographic records.

Another aspect of monographic cataloging that has become more like the cataloging of serial resources is the increased instability and impermanence of the bibliographic records for electronic monographs. Before there were electronic books, the cataloging of monographic resources was fairly stable. The bibliographic record for a given monograph was not likely to be edited much or at all. On the other hand, serials cataloging has always been a matter of trying to hit a moving target. With serials, any number of features, including the publisher, the frequency of publication, and the very title can change. Serials catalogers are well acquainted with frequently editing "their" records. Now, with electronic resources, some of that instability has made its way into the cataloging of monographs. The URLs and URIs used to link to resources, as well as other access information for electronic monographs, can change over time and the bibliographic records for these resources need to be edited to remain current and useful. The problem of trying to hit a moving bibliographic target is no longer exclusively (or just about) the concern of serials catalogers.

One final serials cataloging concern that has entered into the realm of monographs cataloging is the issue of trying to decide between having a single bibliographic record or separate records for the print and electronic versions of a resource. The question is whether to use the record for a print version of a resource and add the URL for the electronic version or whether to use two separate bibliographic records, one describing the print version and one describing the electronic version. Serials catalogers have been wrestling with this issue since the emergence of electronic journals. Generally speaking, public services librarians have been more likely to prefer the single record approach, arguing that it makes it easier for patrons to interpret the public catalog display. As a serials cataloger, I have generally preferred the separate record approach, because I believe that we are actually describing two different, albeit related, resources. With the development of batch loading and batch updating services for electronic serials, many libraries that once preferred the single record approach (such as my own institution) moved to a separate record approach, because having separate records in the local catalog makes it easier to edit or remove the records for electronic serials as these resources change or are no longer part of a particular purchasing bundle. As more libraries are purchasing electronic books, they are having to decide on this same issue of whether to merely add a URL to the record for a print version or to add a separate bibliographic record. And again, the implications of bulk loading argue for the separate record approach over the single record approach.

### Conclusion

Perhaps my title has overstated the case somewhat. It might not be that *everything* has become more serial-like, but there are certainly more formats of materials that are being managed in ways that are familiar to serials librarians. The rapid proliferation of licensed materials as well as materials purchased through subscriptions indicate a certain serialization (if you will) of non-serial materials. The issues related to the bulk-loading and increased data maintenance and editing that the bibliographic records of more and more types of non-serial materials require also make these materials more like serials in important aspects of their management. I see no reason why this trend would decrease over the coming years; in fact, I fully expect it to grow. If that is the case, I expect to see serials management skills become increasingly important within libraries.

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# *Making and Managing Metadata*

## The Book Industry Study Group: Promoting Partnerships and Perspectives

*By Tom Adamich*

This column will explore one of the library community's key publishing industry partners—the Book Industry Study Group (BISG). Because working with books in all formats and understanding the publishing industry are a key responsibility of library technical services librarians, knowing about groups and individuals who can help us do our jobs better and provide resources that we can use is important. Although most technical services librarians are familiar with the traditional partners to whom we turn for policy direction and guidelines, e.g., the Library of Congress, the American Library Association, and the International Federation of Library Associations and Institutions, the Book Industry Study Group (BISG) and the wealth of technical publishing information and policy development opportunity it provides to its members may not be as well known.

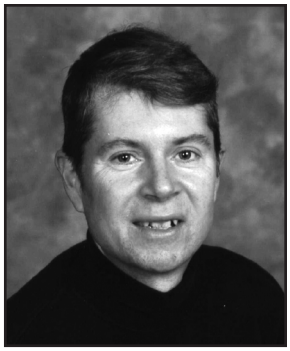
### Libraries are on BISG's Radar

BISG has been supporting the research needs of the publishing industry since it was founded in 1975. At that time, an active group of publishing industry professionals who were meeting at the annual Book Manufacturers Institute Conference, decided to form a group dedicated to maintaining a book industry research program. As a result, BISG was incorporated as a not-for-profit organization in February, 1976.[1] While the primary mission of BISG is to promote and support the research needs of the publishing industry, the obvious synergy of the industry with libraries has long been a focus of the group. In fact, in 2004, BISG presented its first conference program, "Making Information Pay." This program was followed by a higher-education version of Making Information Pay as well as an educational webcast project, which began in 2009. Both of these initiatives include targeted programming and resource development for libraries. (To better understand exactly where the BISG is relative to collaborating with and supporting libraries, I recently conducted a virtual interview on July 9, 2014, with Len Vlahos, BISG Executive Director, and he offered the following perspectives.

**Tom:** What are some of the core areas and benefits that BISG membership would offer to libraries?

**Len:** There are several BISG initiatives and resources which may be of interest to libraries. These include statistical compilations and survey data.

**Tom:** We know that library professionals rely on sound statistical data to use in making materials purchasing and materials management decisions. What are some of the best BISG resources available to use in best accomplishing those tasks?



**Tom Adamich**

**Len:** I think that two BISG resources in particular--*BookStats* and *Digital Books and the New Subscription Economy* fulfill the information need you have described quite well. *BookStats* is a collaborative effort between BISG and the Association of American Publishers (AAP). *BookStats* provides the only comprehensive view of the size and shape of the U.S. book publishing industry, measured by publisher net unit and dollar sales. This data project carefully tracks transformational shifts in how book content is sold in the digital age and provides U.S. publisher net revenue and unit sales across three dimensions:

- Formats: including physical (hardcover, softcover, audio, and mass market), non-physical (e-book, downloadable audio, Internet products and services, digital learning materials), and bundles
- Categories: including trade fiction and nonfiction, juvenile, religious, higher education, K-12, professional, and scholarly books
- Channels: including physical

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# *Making and Managing Metadata*.....

## The Book Industry Study Group: Promoting Partnerships and Perspectives

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retail (chains, indies, college stores, mass retailers, and specialty), online retail, institutional sales, direct-to-consumer, jobbers & wholesalers, book fairs, and export sales.

Figure 1 provides an excellent visual representation of *BookStats* content.

While *BookStats* is one BISG product that does not have immediate applicability to libraries, it does measure publisher sales into the various channels in which libraries participate. As libraries generally buy from intermediaries and not directly from publishers, libraries themselves (as a percentage of overall book sales) are not visible in this report. However, the sales trends featured in *BookStats* may be useful to libraries when negotiating purchasing contracts with intermediaries or tracking publishing industry trends for use in making educated collection development decisions.

*Digital Books and the New Subscription Economy* is the first comprehensive view of how the subscription model of selling books is unfolding across all sectors (trade, higher education, and professional) of the publishing industry.[2] I think this will be interesting to any and all stakeholders. *Digital Books and the New Subscription Economy* paints a clear picture of how content producers and others in the publishing value chain are reacting to new forces in the marketplace, and provides timely, relevant information to help answer questions such as:

- Will there be a "Netflix of e-books" or will more focused verticals develop?

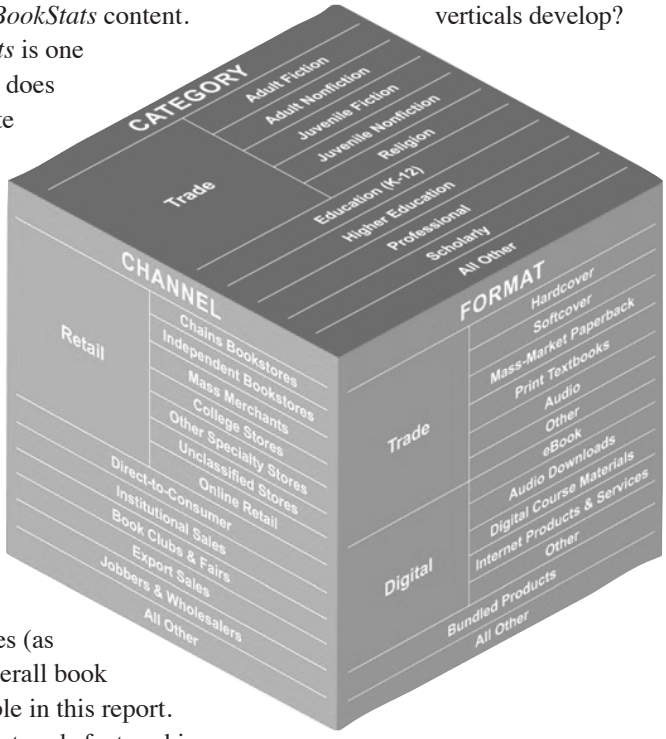


**Figure 1. BookStats Data Cube**

- Who are the major players in digital content subscription? What are their business models, and who are their customers?
- How have subscription services fared across different markets (professional, scholarly, higher education, trade)?
- What are the attitudes of agents, authors, publishers, and librarians toward digital book subscription? What factors motivate or dissuade them from participating?

**Tom:** I know that the BISG conducts numerous surveys related to publishing industry research and operations. Are there any surveys in particular which may be of interest and use to libraries?

**Len:** That is a great question! There are several BISG surveys that examine particular publishing processes and outputs that directly impact libraries. We have compiled them into what we call our *Best Practice Guides* series. One example is *Best Practices for Product Metadata: Guide for North American Data Senders and Receivers*.[3] Although our metadata work is largely aimed at the publishing trade, we know from analyzing the results of our surveys of librarians and library leaders that (1) metadata is extremely important to the library community, and (2) libraries employ metadata in library catalogues, most commonly as part of an Integrated Library Management System, using the MARC metadata standard. As libraries are showing increasing interest in BISAC and in understanding ONIX, I think all of our metadata documents (freely available to anyone) will be of interest. This includes not only the best practices, but also *Best Practices for Using Keywords in Metadata*, and *Recommendations for Citing Common Core State Standards in ONIX*.[4]

**Tom:** Would you tell us a little bit more about the BISAC subject headings and their relationship to libraries?

**Len:** Certainly. The BISAC Subject Headings List, also known as the BISAC Subject Codes List, is a standard used by many companies throughout the supply chain to

categorize books based on topical content. The subject heading applied to a book can determine where the work is shelved in a brick and mortar store or the genre(s) under which it can be searched for in an internal database. The complete BISAC Subject Headings List is available online at no cost for one-to-one look-up. You also may request a non-member end user license agreement (www.bisg.org/docs/BISAC_Subject_Codes_EULA_for_non-members%20_final.pdf) to download versions of the Subject Headings List in Excel, PDF, and Word for unlimited use or for incorporation in an organization's internal databases.

BISG also has broadened the use scope of the BISAC Subject Headings to enable its use in other publishing-related venues, including libraries. One is our partnership with OCLC to create BISAC to Dewey mapping. Diane Vizine-Goetz profiled this initiative at a workshop in 2011.[5] You also can see a use-case presentation by Andrea Kappler about a library group that converted from Dewey to BISAC.[6]

**Tom:** How can libraries, particularly academic libraries, use BISG resources to articulate materials needs to our primary stake holders and funding agencies (college and university administrators, academic units and their committees, and advisory and governing boards)?

**Len:** The BISG has a great resource to accomplish that task—*Student Attitudes toward Content in Higher Education* and its companion *Faculty Attitudes toward Content in Higher Education*. Both are annual BISG publications. The former reports the findings of a survey of students enrolled in two-year, four-year, private, public, and non-profit colleges. The latter reports survey findings from faculty teaching at for-profit and two- and four-year colleges. These are great attitudinal studies of how college students and professors are adapting to the digital transformation. How and where do they acquire content? What kinds of content—textbook, e-book, integrated learning system—improves learning outcomes? What are attitudes toward copyright? We're completing our fourth volume, so there is trend-reflecting data to use for strategic planning, decision making, etc. These are useful for anyone in a university environment.

**Tom:** What are some of the other "library-related" initiatives the BISG pursues? How can libraries take advantage of these resources?

**Len:** We have several forums and initiatives in which libraries who wish to become members of the BISG may participate and to which they can contribute in order to maximize the benefits of BISG membership.

Through the BISG/National Information Standards Organization (NISO) partnership, we partner with NISO on a half day conference at the American Library Association annual conference called "The Changing Standards Landscape." Our latest contributions to this valuable conference presentation focused on the changing standards landscape.[7] NISO also participates in our Identification Committee, and Todd Carpenter (NISO Executive Director) and I stay in close touch.

We offer an "Executive Lunch Series." Each Executive Lunch is an intimate, exclusive educational and networking opportunity. We bring together 25 publishing industry stakeholders—typically senior director level professionals and above—around a specific topic. So far, we have made presentations on topics including "agile content development," "metadata," and "opening the book" (a discussion on whether or not digital books should be in "containers" or part of the open web.). Our July 2014 presentation was "Reading Data Analytics," a look at how consumers are actually interacting with digital content. To date, most of these events have focused on trade publishing and bookselling; however, we'd be very interested in developing content aimed at libraries and their providers. [Author's note: Feel free to share ideas (vls@tusco.net), and I will pass them along to Len and the BISG staff for consideration.]

We present a series of webcasts, the majority of which revolve around our standards, best practices, and research work. As noted above, we are interested in developing content specifically for libraries and their providers.

In the area of professional development, we have offered ONIX training with Graham Bell in the last two years. Graham is the executive director of EDItEUR, the international standards body that maintains the ONIX standard. These are full day, detailed sessions, and have been very well received. We are in the process of launching e-book development courses in partnership with Firebrand/E-book Architects. These also will be full-day, in-person learning opportunities. We will launch three beta courses—QA for Ebooks, the Business of Ebooks, Images and Graphics for Ebooks—this fall.

The Subject Codes Committee is the group that manages the BISAC Subject Codes. We have seen increased interest from libraries over the past

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# Making and Managing Metadata

## The Book Industry Study Group: Promoting Partnerships and Perspectives

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few years in BISAC codes. While BISAC codes are not intended to be a substitute for Dewey or LOC, they are a consumer-friendly way to categorize content. This committee also oversees the Thema Working Group. If you are not familiar with Thema (www.editeur.org/151/Thema), it is the new global subject code scheme, developed with the cooperation of nearly 20 national groups, including the United States and Canada and officially launched January 1 this year. (Thema is also managed by EDItEUR.) We do not expect Thema to replace BISAC in the short term, but it is a wonderful bridge to other local classification schemes, such as the United Kingdom's Book Industry Communication (BIC) Standard Subject Categories (www.bic.org.uk/7/BIC-Standard-Subject-Categories) and the French Commission de liaison interprofessionnel du livre (CLIC) Nouvelle classification (www.sne.fr/img/pdf/Actualit%C3%A9s/ThemesCLILClassification%28version0205%29.pdf).

BISG's Metadata Committee is one of our most active committees. This group produces several of the documents referenced earlier and serves as the U.S. arm of the ONIX standard.

### BISG Implications for Libraries and Future Directions

As is clearly evident, the BISG has a great deal to offer libraries in the way of resources and research supporting what the publishing industry is doing currently, what it will do in the future, and how those activities can benefit libraries (and, ultimately, the populations we serve). Since the BISG is looking for input from libraries to use as it develops research initiatives, content, and programming, I encourage you to share those thoughts with me.

In a future "Making and Managing Metadata" column, I will examine in greater details the activities of one of the BISG committee and how libraries can benefit from the results of the committee's efforts.

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# Book Reviews

**Calhoun, Karen. *Exploring Digital Libraries: Foundations, Practice, Prospects.* Chicago: ALA Neal-Schuman, 2014. 322 pp. ISBN 978-1-55570-985-3 (softcover) $95.00**

Quite often, when one thinks about the concept of the digital library, it is in the context of the "here and now" or in the future, as in where are we going next with digital libraries. In Karen Calhoun's book, *Exploring Digital Libraries: Foundations, Practice, Prospects,* not only does the author discuss the current state and the future of digital libraries, but she also thoroughly examines and explains the history and evolution of the digital library.

In the first two chapters the author goes into great detail about what she considers to be, "the first decade of progress in digital libraries" which runs from 1991-2001. Chapter 3 goes on to chronicle the second decade of digital libraries, 2002-2012. These three chapters give the reader a more complete understanding of how the digital libraries of today evolved. Even though Calhoun's historical research focuses on 1991 to present day, she also provides research from as far back as 1945 and later on to 1965 to show some of the earlier building blocks that may have led to the digital libraries of today. Throughout these chapters, the author highlights significant themes, successes, and challenges that occurred along the way.

In the next two chapters, Calhoun examines actual collections and collection building. Chapter four specifically focuses on repositories, while chapter five concentrates on hybrid libraries, which she defines as, "collections that contain non-digital, digitized and born-digital resources" (111). The "Hybrid Libraries" chapter discusses the changes in information seeking behaviors, library collections, technologies, discovery, access, and next-generation library systems.

Chapters 6 through 10 are devoted to the social roles of digital libraries, the communities that they serve, their value, and the impact that they have on those communities. In chapter 8, the author distinguishes between open access, subject-based and institutional repositories. In chapters 9 and 10, she ties it all together by going into great detail explaining the "social web." These final chapters also set the stage for thinking about digital libraries for the future.

In my opinion, most readers will find the layout of this book to be well-organized and quite useful. At the beginning of the book, there is an extensive table of contents, a ten-page glossary, and a list of all figures and tables. Detailed illustrations can be found throughout the book. There is also a comprehensive, 52-page reference section at the end of the book, as well as a 12-page index.

I found Calhoun's book, *Exploring Digital Libraries* to be extremely informative and well researched. There is a vast amount of information condensed into its 322 pages. This book would be a valuable read for any librarian, archivist, or information technology professional who is working with or has an interest in digital collections. This title also would be an excellent starting point for anyone doing additional research on digital libraries or related topics. Finally, I could foresee a digital libraries course created using this title as the textbook. With that being said, I would recommend this book to anyone with an interest in digital libraries.

*Tracie Ballock, Head of Collection Management at Duquesne University, Pittsburgh.*

**Canepi, Kitti, et al. *Managing Microforms in the Digital Age.* Best Practices Guide Series of the Continuing Resources Section's Research and Publications Committee. Chicago: Association for Library Collections and Technical Services, 2013. Free. Available at www.ala.org/alcts/resources/collect/serials/microforms.**

This publication is a revision of *Guidelines for Handling Library Orders for Microforms published by the American Library Association in 1977.*[1] The authors state the revised work "provides librarians and information management specialists with some basic information about managing microform collections. The publication does not attempt to be a comprehensive review of the microform industry, nor does it serve as a guide for preservation microfilm production. . . . [It] addresses trends in bibliographic control, storage environments, current vendors and resources, and microform terminology."

Chapter 1, "Microforms in Libraries and Archives," begins with a very interesting history of the development of microforms in the 1850s and the growth of their use as an important part of library collections beginning in the 1930s. Toward the end of the 1990s libraries shifted from microforms to electronic files; however, the authors point to the continued use of microforms for archiving purposes. "For some

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types of source documents, the black-and-white rendering on film secures an accurate and faithful reproduction, providing a legally reliable surrogate that cannot be altered without detection. The chapter continues with sections on journals, newspapers, brittle books, and other research materials.

Chapter 2, "Microform Producers," is a short chapter with sections on commercial micropublishers, services bureaus, and in-house operations. Chapter 3, "Microform Terminology," begins with a description of microfilm, microfiche, microopaques, aperture cards, computer output microforms, and other less familiar formats. The chapter continues with a description of four types of film base and three types of film emulsion. A final section describes the components of film quality: reduction ratio, polarity, density, generation, targets, and standards. The first part of the next chapter "Microform Handling," is devoted to the equipment necessary to access the content of microforms. The latter part of the chapter concerns storage: the requirements for housing, cabinets, and shelving followed by recommendations for an effective environment.

Chapter 5, "Bibliographic Control and Access," the longest chapter in this work, will particularly interest *Technicalities* readers. The authors begin by pointing out that in the past microforms have been inadequately catalogued for a variety of reasons. They then describe methods of bibliographic access that have been used by libraries over the years to provide access to microform collections: microform title lists from micropublishers, commercial microform guides, institutional microform guides, consortial holdings lists, and individual bibliographic records in online catalogues. This is followed by a look at historic bibliographic control from the National Register of Microform Masters started in 1965 to OCLC's work in the 1990s and the current trend of bibliographic control. The section on microform cataloguing contrasts *Anglo-American Cataloguing Rules*, 2nd ed., with *RDA: Resource Description and Access* rules and describes both the single-record approach and the multiple-record approach.[2] The chapter ends with a discussion of microform use and access.

Chapter 6, "Digitization," is a small chapter containing only two paragraphs noting that digitization from microform collections is rapidly increasing online access to research materials and the quality of the online version often depends on the quality of the microfilm. The title of the final chapter, "Donating, Discarding, and Recycling," describes its content.

Only four chapters are followed by references. The bibliography contains 72 items that the authors describe as "some historic and seminal articles that provide perspective on the management of microforms in the past 30 years . . . by no means an exhaustive bibliography."

The three appendices are: "Sources for Current Awareness" providing 13 sources, "Microform Reader, Printer, Scanner Manufacturers" listing the names of eight firms, and "Commercial Microform Providers and Service Bureaus" listing 11 firms.

The four authors are broadly based (Kitti Canepi (Nevada), Becky Ryder (Kentucky), Michelle Sitko (Pennsylvania), and Catherine Weng (New Jersey)) and in positions of responsibility in their places of work. This document is clearly written and full of useful information. It is highly recommended and it is easily available and—wonders of wonders—it costs nothing!

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*Jean Weihs, Principal Consultant, Technical Services Group, Toronto, Canada.*

**Chowdury, G.G., and Foo, Schubert, eds. *Digital Libraries and Information Access: Research Perspectives*. Chicago: Neal-Schuman, 2012. xvi, 235 pp. 978-1-55570-914-3 (softcover) $99.95.**

The degree of difficulty of succeeding at this wide scope, at this time in the history of digital libraries, and with this much latency between creation and distribution, is quite high. While there are some individual pieces of quality within, the collection suffers from a number of problems.

Some pieces do not seem to fit well in the collection. Part of this may be attributable to the immense topic of digital libraries. The editors have not put many limits on this topic—the chapters within cover search, usability, preservation, accessibility,

cross-vocabulary subject mapping, intellectual property, metadata, and a number of other related topics. In the introduction (Chapter 1), the editors make a case for having limited the topic by narrowing it further to information access, but that topic is interpreted very widely.

The problem of "fit" is exacerbated by some chapters that fail to go beyond a simplistic recounting of current trends. Too often, some chapters fail to make any sort of argument beyond "these projects have occurred" or "these topics have been written about." There are several cases in which a conclusion or summary makes a point about trends or patterns, but this comes as a revelation because the patterns are not evident in the bulk of the chapter.

Rather than pick specifically on some weak chapters, I would like to call out a few chapters as being of quality. Chapter 7, Chern Li Liew's "Toward Socially Inclusive Digital Libraries," manages to be a general discussion of inclusionary principles and obstacles while grounding that discussion with specific references and examples. The extensive bibliography is welcome, as well as the inclusion of many entries from outside the United States and Western Europe.

As a novice on the particular topic, I found Milena Dobreva and Raivo Ruusalepp's chapter on digital preservation to be an informative survey of trends, topics, and projects, with a good balance between a broad perspective and technical language.

The field of digital libraries and how they provide access to information proves, as I hinted before, an extremely difficult one to summarize at this point in time. The scope of efforts covered in the books is staggering, from the mega-aggregation of Europeana to individual, highly focused projects at single libraries. We can think of this as an effect of the fairly long history of digital libraries.

This long history is at an important point. The virtues of scale and interoperability are increasingly persuasive. The setting, scope, and manner of social media and its interaction with cultural institutions is in rapid flux. This makes it what seems like an especially risky time to release a book written about this sector with content that is two years old.

Looking at the extreme reach of the book and its regrettably short window of currency, it is hard to recommend it. The authors would have been well served to build on some of the strong chapters of the book, supporting them with some more closely allied discussions. There are many topics just in the narrow area of inclusion and accessibility—current and future—that would have made a more effective, focused look at important challenges facing digital libraries.

*John Chapman, Product Manager, WorldShare Metadata at OCLC, Inc.*

**Herring, Mark Y. *Are Libraries Obsolete? An Argument for Relevance in the Digital Age*. Jefferson, NC: MacFarland, 2014. 258 pp. ISBN 978-0-7864-7356-4 (softcover) $25.00.**

There is probably no other profession that spends as much time thinking about its own demise as librarianship. Mark Y. Herring's interesting and thoughtful book is the latest, though surely not the last, in a long series of monographs and articles debating the future of libraries. An upfront caveat for selectors, Herring is writing primarily for and about academic libraries, though there is an occasional reference to public and school libraries when he feels it is appropriate.

*Are Libraries Obsolete?* takes as its stating point a 2000 article called "10 Reasons Why the Internet is No Substitute for a Library" that Herring published in *American Libraries* and his subsequent book, *Fool's Gold: Why the Internet is No Substitute for a Library* (McFarland, 2007). His new book revisits and reevaluates those ten reasons some ten years later. Herring goes on to look at the state of libraries in 2013 and then explore some possible futures. Although he is highly critical of the web and, in particular, its impact on scholarship and literacy, Herring is no Luddite, and is well aware that technology is deeply embedded in our contemporary culture. At the same time, his arguments for the continued value of the library resonate, for the most part. Herring calls on library traditionalists and web advocates alike to take more of a both/and approach, rejecting the either/or dichotomy that is all too common in discussions of the future of libraries. In doing so, Herring challenges ideologues on both sides of the argument over the continuing validity of libraries in an increasingly digital world, though he clearly is of the opinion that libraries are not obsolete.

Following an introductory chapter, Herring uses the first section of the book (chapters 2-9) to re-examine his "10 reasons" in light of technological advances and changes to libraries since 2000. While technological advances have perhaps slightly lessened some of his concerns, particularly in the areas of depth of content on the Internet and the ubiquity of Internet access (chapter 9), Herring asserts that his arguments for why the Internet cannot and should not replace libraries still are compelling. Chapter 2 focuses on the point that

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everything is still not on the Internet. Herring points out that, in its current manifestation, the Internet has spotty coverage of proprietary and scholarly resources and a strong bias towards Western and English language materials. Of equal concern is the amount of what Herring calls "misinformation" and "disinformation" that is seen in web search results. All of these concerns make the Internet less than ideal as a source for scholarship.

In chapters 3, 4, and 5, Herring continues his examination of where the Internet does not match up with libraries. Here, he covers searching, quality control, and impermanence of content, pointing out in each case how libraries are superior. Some of his arguments are ones that have been made for years—lack of authority, the false impression that search engines are searching the whole web, the problem with disappearing websites. Herring does a good job showing how these problems continue to plague Internet use. He also touches on concerns with crowd-sourcing, issues regarding control of web content, quality of content, and preservation that support his point that libraries still should have a vital role in scholarship. The argument is diffused somewhat by a two-page digression into Internet pornography in the section on quality of web content.

Chapters 6-8 continue the examination of the Internet and issues relating to libraries, focusing on digitization, copyright, and e-books. Herring notes that "We have not reached the stage . . . in which any book or facsimile of information can simply be zapped to all who need it wherever they are" (79). There are still limitations to even the largest digitization projects and thus libraries still remain important as a source for materials for scholars. On the copyright front, Herring places the library squarely in the middle of argument between the "Information wants to be free" advocates and those who would place increasingly stringent limits on use of any published material. As noted above, chapter 9 covers two areas, depth of content and ubiquity of access, where Herring admits that two of his "10 reasons" are perhaps not as great a concern as they were in 2000.

In Part Two of his book, Herring examines four areas where he feels that the Internet is having deleterious, if unintended, effects on both libraries and society, reading, literacy, privacy, and piracy. He argues that in each of these areas libraries support their users and, as such, cannot and should not be abandoned in favor of the Internet. Citing decreasing reading scores, a variety of articles and studies, and anecdotal reports, Herring asserts the negative impact of the Internet on our ability to read carefully and closely. While the Internet is decreasing our literacy, Herring argues that the library enhances literacy and comprehension in a variety of ways, to the benefit of both individuals and society. Similarly, as the Internet erodes our individual privacy, with our willing agreement or not, Herring notes the long time commitment of libraries to user privacy and confidentiality. Herring addresses piracy in the final section of Part Two, tying it to concerns about copyright, but like the section on pornography mentioned above, the piracy piece is not as clearly connected to the ongoing value of libraries. While the issues Herring raises are without question important ones, linking them more closely to the value of libraries would have made this section more cogent.

Part Three of *Are Libraries Obsolete?* explores current trends in libraries and then looks at two potential futures. In the first section, chapter 13, Herring provides useful and thoughtful summaries of some important trends in library staff, user interactions, collections, and spaces, again with an academic library focus. He makes some provocative suggestions here and reinforces his theme that libraries do need to change and change more rapidly than in the past, in order to remain relevant. As he says, libraries "need to adapt quickly and well" (186). Chapter 14 closes the book with two possible futures for libraries "in our technologically astute future" (189). Herring applies the TEMPLES environmental scan, looking at technology, economy, markets, politics, laws, ethics, and society, to the question of the obsolescence of libraries. Scenario 1 answers the question in the affirmative, as the pressures exerted by the TEMPLES sections prove too great for libraries to survive the effects of the Internet. Scenario 2, however, offers some hope, where a combination of technological and human efforts leads to both a stronger library and a stronger community. But, as Herring tells us, "If there is a future for libraries, it must be a proactive one we create" (214). He concludes this final chapter with a call to action, listing what librarians need to do to ensure the future of libraries. Herring's book will be of interest to academic librarians and of anyone interested in the success of libraries.

*Barry Trott, Digital Services Director, Williamsburg Regional Library, Williamsburg, Virginia.*

# News From the Field

## People

■ **Lois Mai Chan** passed away in August. A professor for many years in the library and information science program at the University of Kentucky, she is known for her seminal books on cataloging, particularly *Library of Congress Subject Headings: Principles and Application* and *Cataloging and Classification*, both of which have appeared in multiple editions. Gifts in her honor can be sent to the Lois Mai Chan SLIS Enrichment Fund, UK Office of Development, Sturgill Development Building, Lexington, KY 40506-0015.

■ **Rachel Frick** has joined the Digital Public Library of America as its business development director. Frick was previously director of the Digital Library Federation.

■ **Frederick Gale Ruffner Jr.**, who founded Gale Research Co. with his wife Mary Evans Ruffner, died in August at the age of 88. *Encyclopedia of Associations* was Gale Research's first publication in 1956. Gale Research grew to 400 employees and published more than 2,000 books, including library reference classics such as *Contemporary Authors* and the *Dictionary of Literary Biography*. Gale remains in business today as a Farmington Hills-based brand of Cengage Learning.

■ Activist librarian **Zoia Markovna Horn** died in July at the age of 96. She was famous for being the first U.S. librarian to be jailed for refusing to divulge information that violated professional principles of privacy and intellectual freedom. An activist member of the American Library Association (ALA) and a member and chair of its Intellectual Freedom Committee, Horn was jailed for 20 days for contempt after refusing to testify in the 1972 conspiracy trial of the "Harrisburg Seven." Horn continued to speak out on intellectual freedom, opposing, for example, the Patriot Act and library fees for service. In 2002, Horn won the Jackie Eubanks Memorial Award and the Robert B. Downs Intellectual Freedom Award.

■ EBSCO Information Services has named **Kate Lawrence** Vice President, User Research. Lawrence leads the User Research Team and the research activities that enable EBSCO to gain user insight and improve the customer experience.

■ **Tom Sanville**, LYRASIS Senior Director of Licensing & Strategic Partnerships, will retire at the end of December 2014, although he will continue to work with LYRASIS on a part-time basis. Prior to joining LYRASIS, Sanville was the Executive Director of OhioLINK (1992 to 2010) and served as Vice President of Marketing for OCLC. He has been active in the International Coalition of Library Consortia (ICOLC), Libraries Connect Ohio, and many other library organizations.

## Of Professional Interest

■ The **Digital Public Library of America** (DPLA) has received an Institute of Museum and Library Services (IMLS) $999,485 grant for a major expansion of its infrastructure. The Digital Public Library of America brings together the riches of America's libraries, archives, and museums, and makes them freely available to the world.

■ **The Association of Research Libraries** (ARL) has published ***Digital Collections Assessment and Outreach*** (SPEC Kit 341), compiled by Marilyn N. Ochoa, Laurie N. Taylor, and Mark V. Sullivan. This publication investigates the methods ARL member libraries use to maintain the relevancy of their locally curated digital library collection and to sustain, grow, and capture return on investment, and enhance existing resources through outreach and assessment. It includes examples of digital project selection criteria, outreach and assessment guides, assessment reports, marketing plans, lesson plans, job descriptions, and works created with material from digital collections.

■ **OCLC Research** was awarded the Presidential Citation of the Association for Library Collections & Technical Services (ALCTS) for outstanding service to ALCTS in the 2013 report, *Understanding the Collective Collection: Towards a System-wide Perspective on Library Print Collections* (http://oclc.org/content/dam/research/publications/library/2013/2013-09.pdf) by Lorcan Dempsey and colleagues. This award recognizes distinguished achievement by an ALCTS member or members who make significant contributions to the association and to the profession but whose accomplishments do not fall within the criteria for ALCTS' other awards.

■ The not-for-profit digital archive **Portico** and **CHORUS** (Clearinghouse for the Open Research of the United States) have entered into an agreement to support the preservation requirements of the February 2013 policy memorandum released by the White House's Office of Science and Technology Policy. This policy directs United States federal agencies to develop plans to

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make articles reporting on the research they fund freely available to the public immediately or after an embargo period, and highlights requirements needed to ensure long-term access to this research through preservation.

■ The **HathiTrust Research Center** (HTRC) received a $324,841 National Endowment for the Humanities grant for a new project—Exploring the Billions and Billions of Words in the HathiTrust Corpus with Bookworm: HathiTrust + Bookworm (HT+BW). The HTRC is partnering with the Cultural Observatory team that developed the Google Books Ngram Viewer together with Google. The goal of this collaboration is to implement a greatly enhanced open-source version of the Cultural Observatory's "Bookworm," a faceted text analysis and visualization tool used to track trends in the use of words and phrases over time.

## Publishers and Vendors

■ **Hachette Book Group** will offer its popular fiction and nonfiction e-books via **EBSCO eBooks** and **Audiobooks**. These titles include works by David Baldacci, Michael Connelly, and Elin Hilderbrand.

■ **EBSCO** announced that the content that was available through H.W. Wilson's *Doctoral Dissertations Accepted by American Universities* is now available in the free database *American Doctoral Dissertations 1933-1955*. The database is freely available to researchers at www.OpenDissertations.com.

■ **ebrary** titles are now available through **Ingram's OASIS** content platform. **ProQuest EBL** has also been integrated with Ingram's e-book approval plans and demand-driven acquisition services. Libraries using Ingram's OASIS platform can now search and purchase both EBL and ebrary e-book content through OASIS. Users can view and select from 600,000+ EBL and ebrary e-book titles from more than 1,000 publishers. Billing is consolidated, offering libraries integrated acquisition services and invoicing for all ProQuest e-book content.

■ **Shanghai Library**, the largest public library in China, has contributed 2 million holdings to OCLC's **WorldCat**. This record load includes some 770,000 unique bibliographic records representing books and journals published between 1911 and 2013.

■ **Springer** and **Lavoisier** have signed an agreement for the sale of Springer-Verlag France's French-language science, technology, and medical publications to Lavoisier, effective as of September 1, 2014. Archives and the articles to be published up to and including December 2016 will continue to be accessible online via SpringerLink. All past and current subscribers will have continued access to the journals archives on the Springer platforms. The French-language products published by Springer Healthcare in Paris and those published by Springer Group entities are not part of this transaction and will remain with Springer.