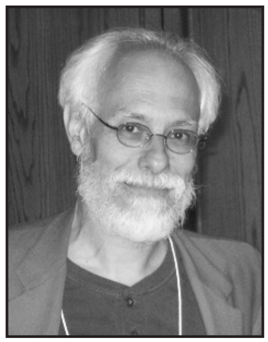
Technicalities™

Information Forum for the Technical Services Professional

Reality Check

The Fourth Thing

By Jim LeBlanc



Jim LeBlanc

A year or so ago, a Cornell colleague called my attention to a TED talk by advertising guru Rory Sutherland. Although focused primarily on marketing and customer relations, Sutherland's presentation, entitled "Sweat the Small Stuff," does indeed relate to much of the tactical and operational thinking in which those of us in technical services are now constantly engaged.

Sweating the Small Stuff

In this particular address (the speaker has participated in more than one TED event), Sutherland contends that most organizations know to approach "big, important problems," usually through the implementation of "big, important and, most of all, expensive solutions."[1] Further, he remarks that these big solutions are normally driven by strategic planning, consultancy, and high-level decision-making. What organizations are less successful in discovering and developing are those solutions that are less grandiose, less expensive, and potentially more useful for increasing operational effectiveness and customer satisfaction.

Sutherland categorizes four approaches to organizational planning and innovation, all of which can have some influence on the end result or process. These are: strategy, consultancy, trivia, and a fourth thing that he coyly refuses to name. He inserts these elements into a four-square figure that

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Dollars and Sense

Monographs and Serials

By Sheila S. Intner

Sheila S. Intner

As technologies advance and online retailers combine products and services to take advantage of them, new ways of buying books are appearing. Not long ago, I received an offer from Amazon.com, the online retailer of which I am a faithful customer, to buy books for my Kindle by subscribing to their Kindle Unlimited service. For a trifle less than $10.00 a month (or about $120.00 a year), I am being provided with access to thousands upon thousands of Amazon's Kindle

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

Technicalities: 34 Years and Counting!

By Peggy Johnson

Peggy Johnson

This issue of *Technicalities* is the first in volume 35. For a relatively small and focused library science journal, I consider this to be an impressive accomplishment. Many of our readers may not know that *Technicalities* bears the subtitle "Information Forum for the Technical Services Professional." That sums up our mission—to focuses on timely topics of interest to those who work in technical services and collection development and management.

Technicalities was created in 1980 by Brian Alley and Jennifer Cargill. The premiere issue (vol. 1, no. 1) appeared in December 1980 and was published as a monthly by Oryx Press. The first editor was Milton T. Wolf. That first issue had an impressive 16-member advisory board, which included Brian, Jennifer, Sanford Berman, Jim Dwyer, Maurice Freedman, John Secor, and Jean Weihs, who has been associated with the journal since its beginning. The first issue was 12 pages on glossy paper; the annual subscription price was $46.00. With vol. 1, no. 8, Brian and Jennifer took over as co-editors. They continued in this shared role through vol. 6, no 6 (1986), after which Brian became the sole editor. Sheila S. Intner, a regular contributor to *Technicalities*, followed Brian as editor in March 1995 (vol. 15, no. 3). I assumed editorship with the Sept./Oct. 2000 issue after writing columns on collection development for 12 years. The publisher changed to M. E. Sharpe with vol. 6, no 7. A series of changes in ownership continued into 1994, when then-owner Westport Publishing joined Trozzolo Resources, Inc. Trozzolo continued as *Technicalities* publisher through 2013, when Media Periodicals Division of the Kansas City Gardener, Inc. replaced Trozzolo as our publisher with vol. 34, no. 1. *Technicalities* transitioned to 10 issues per year in 1996 and to six issues per year in 2000. Each issue now contains 24 pages and an annual subscription costs $131. While a 176 percent increase in 34 years may seem significant, the Association for Research Libraries (ARL) reports that the cost of library materials increased 322 percent just between 1986 and 2012 and that ARL member libraries' expenditures for ongoing resources (i.e, serials) increased 456 percent during the same period.[1]

When I took over as editor, I had the benefit of following two stellar editors, Brian and Sheila, and inherited several excellent columnists. Over time, contributors have come and gone—all have enriched this publication. I added a regular book review section and continued the "News From the Field" section. I am proud of implementing the use of Creative Commons Attribution-ShareAlike 3.0 Unported Licenses (CCBY-SA 3.00) for all columns and articles, beginning with the Nov./Dec. 2013 issue. As I noted in my editorial announcing the use of CCBY-SA 3.00, "The prescient editors who started *Technicalities* in 1980 did not require contributing authors to sign over their copyrights, opting instead to allow these authors to retain and manage their intellectual property—a radical concept at the time."[2] *Technicalities* articles are now available in a way that makes content available that can be copied, distributed, edited, remixed, and built upon within the boundaries of copyright law.

In Sept./Oct. 2007, Carlen Ruschoff began contributing to *Technicalities* through a series of articles under the column heading, "Reality Check." These pieces primarily focus on technical services management. She has found superb authors for these articles and also contributed a number herself. In this issue, I am remedying a significant blunder on my part—from now on, Carlen will be listed as contributing editor, a recognition that should have been in place since 2007.

In his introductory editorial in 1980, Wolf explained the aims of *Technicalities*. He wrote,

> We believe that all participants in the information Age have more to gain from dialog, from exchange of opinions and facts, from problem-sharing, than from myopic navel watching and unconcerned specialization. . . . To do this, we want *Technicalities* to be as free from jargon as possible. We hope to offer articles and news in an informal, pragmatic manner. . . . And while we see *Technicalities* as pursuing noble ideals, we don't want to shun a sense of humor; we hope to temper our seriousness with the offbeat, the iconoclastic, the irreverent.[3]

I believe that the editors and contributors in the intervening 34 years have held to this goal. I like to encourage potential contributors by explaining that *Technicalities* offers informed opinion and insights into emerging issues by experienced professionals and that we do not shy away for controversy.

I am on track to become the longest serving *Technicalities* editor with the completion of vol. 35 at the end of 2015. Despite what Brian described as the burdens of "being tied down to deadlines, scribbling editorials, and editing articles and columns," I enjoy being editor.[4] I have had the pleasure of publishing many excellent pieces by thoughtful contributors. I learn new things with nearly every issue and get insights into the troubling issues, accomplishments, and new developments in our profession. I depend on our regular columnists and occasional contributors to ensure a vibrant "Information Forum for the Technical Services Professional." I invite you to join the conversation by submitting articles and writing letters to the editor.

References

1. Association of Research Libraries, "Graph 4: Expenditure Trends in ARL Libraries, 1986-2012," www.arl.org/storage/documents/expenditure-trends.pdf (accessed Dec. 1, 2014).
2. Peggy Johnson, "From the Editor's Desk: *Technicalities* Now Employs Creative Commons Licenses," *Technicalities* 33, no. 6 (Nov./Dec. 2013): 2.
3. Milton T. Wolf, "Editorial," *Technicalities* 1, no. 1 (Dec. 1980): 1.
4. Brian Alley, "Editorial: Almost Ready to Call It a Day," *Technicalities* 15, no. 1 (Jan. 1995): 1.

Dollars and Sense

Monographs and Serials

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book titles available as downloads to my little device. What might such a buying strategy mean for libraries? How might it translate into one option among the array of possibilities a library's librarians consider in acquiring titles for their collections? In fact, where might it reside in a library's organization chart? The titles in the service are what librarians think of as monographs, but because this is a subscription service, billed in monthly increments, might it be considered a serial? This question is where we begin.

When Is a Monograph a Monograph?

Librarians generally divide their acquisitions by publication type: monographs or serials. Starting with the former, according to libraries, a monograph is: "A resource that is complete in one part or intended to be completed within a finite number of parts."[1] Most of the resources libraries buy are monographs—a term used mainly to mean books, though the resources could just as easily be videos or audio recordings, or some other kind of material. What's important is that they are complete at the moment their publishers release them to the marketplace. Printed monographs, the more accurate synonym for books, are usually single volumes made up of printed pages bound between boards or paper covers.

Let us talk about books. The number of pages in a book varies widely. Children's books might contain fewer than a dozen pages, but adult books usually have hundreds. Libraries count their collections in terms of total numbers of books or "volumes" they own, or sometimes, the total number of "titles." In academic libraries, the numbers of books, titles, and volumes tend to be nearly the same, since academic librarians usually buy one copy of a book. In public libraries, though, the number of titles owned is a lot fewer than the number of books or volumes in a collection, because public librarians buy multiple copies of popular books. If a public library director wants the collection to appear larger (and, presumably, more important), he or she reports total books or volumes. But, a stickler for accuracy who wants to know how many different titles are available will find that figure inflated. In both kinds of libraries, though, a "volume" count is interpreted as the size of a collection, even if it isn't always the same as the number of individual titles. After all, two monographs are two monographs—two complete resources—even if both of them are copies of the same title. In fact, librarians often use the terms monographs, volumes, titles, and books as if they are synonyms, although each one has a distinct meaning.[2]

But there are exceptions. Occasionally, very long books or books that take their creators a long time to complete are issued in parts. For example, a library might buy something titled *The Complete Works of Shakespeare* that is three volumes published in three different years.[3] The first volume could contain all of Shakespeare's dramatic tragedies, the second, the histories; and the third, the comedies and poetry. Each volume might be issued when its preparation is done, but the resource as a whole is not considered complete until volume 3 appears. At that time, a library that cataloged earlier volumes as analytics (*The Complete Works of Shakespeare*, volume 1 and *The Complete Works of Shakespeare*, volume 2) can now update the record to represent the entire monograph, that is, all three volumes bearing the title *The Complete Works of Shakespeare*. It is a book (or a title) in three volumes, one monograph.

Another possibility: If each volume of *The Complete Works of Shakespeare* has its own title as well as the overall title—say, the first is called *Shakespeare's Tragedies*, the second *Shakespeare's Histories*, and the third *Shakespeare's Comedies and Poetry*—they can be seen and treated for cataloging purposes as three separate monographs in a series titled *The Complete Works of Shakespeare*. Dealing with monographic series presents different issues. It is a gray area that we will discuss later.

And When Is It a Serial?

A serial is: "A resource issued in successive parts, usually bearing numbering, that has no predetermined conclusion."[4] Typically, library units that buy monographs for the library do not also buy serials. Because of their ongoing nature, separate units are charged with handling them, initiating the subscriptions, and monitoring the receipt of issues continuously throughout the year. In a large university library that subscribes to many thousands of serial titles, this work is very important as well as being incredibly complex. Organizationally, serials units can be part of technical services departments or public services departments, depending on how local administrators see them. If they emphasize buying, cataloging, and processing, serials units are in technical services departments. If they emphasize use and storage near the tools that provide access to their contents in reference departments, they are in public services. In most instances, though, serials units are specialized, distinct units wherever they are placed.

Every issue of a serial bears the same title and is considered part of a whole resource that includes all the issues that have already appeared, the current issue, and all the issues yet to be published in the future. As far as the owning library is concerned, a serial title is never complete, because a new issue is always expected to appear in the future. Even when a publisher claims it is discontinuing a particular title, libraries are dubious. Many "dead" serials have risen from their graves, so to speak, because a new publisher takes over and restarts them or the old publisher changes its mind and decides to start publishing again.

To distinguish the issues of a serial title, publishers assign to them dates, volume numbers or letters, and issue numbers, or some combination of those identifiers. The timing of issues varies widely and may or may not follow a regular pattern. Scholarly journals often are issued quarterly in annual volumes bearing identifications such as Volume 27, Number 4, Winter, 2014. Many popular magazines are issued monthly in annual volumes known by month and year, such as November 2014 or January 2015. But their timing and identifications might not remain static over time. Any issue pattern can change or become irregular. Popular journals can combine issues, appearing monthly for most of a volume, but bi-monthly for the rest. For example, the *Princeton Alumni Weekly* may have been weekly once; but, now, it is semi-monthly from September through May and monthly in June and July, for a total of 20 issues a year. Closer to home, the hard copy edition of *Library Journal* also comes out 20 times a year, to which its publisher adds special issues and features at times during the year. And, although many serials count their basic units annually, some have two-year units, and still others count them in longer or shorter time spans.

The moment a publisher declares a serial title ended, that title becomes a monograph. It will remain a monograph unless it begins to be published again. If that happens, the moment publication resumes, it ceases to be a monograph and returns to its former status.

The Combo: Monographic Series

It looks as though nothing could out-complicate serials, but the publication pattern we call monographic series does just that. A monographic series is "a group of separate resources related to one another by the fact that each resource bears, in addition to its own title proper, a collective title applying to the group as a whole. The individual resources may or may not be numbered."[5] This presents a dilemma for library catalogers. They must choose what to emphasize and what to ignore—the individual monographs or the group. On the one hand, each monograph in the group can be treated separately with the series title added as a secondary access point for the benefit of people who, having availed themselves of one monograph in the series, are interested in more of them. Or, all the members of the group can be treated as if they were parts of one serial title, with each part identified by the numbers assigned by the publisher if there are any, or by another means, such as their publication dates or their individual titles.

The same library that decides to treat one monographic series as separate items with an added series title can decide to treat another as a serial. It is a local decision. The difference is in the amount of bibliographic information provided in the library's catalog. Separate item treatment gives each monograph a full description, subject headings, and call numbers. Group treatment gives none of that, because standard cataloging practice is to omit data likely to change from issue to issue. This means only the group/series title appears in the catalog record, fewer subject headings are assigned and they must be broad enough to encompass all the individual titles, and only one call number is assigned to all the parts. None of the individual titles or authors is listed in the catalog record so none are made into headings that can be searched.

Treated as parts of a series/serial, the monographs in a monographic series disappear. They are part of the collection, but cannot be searched by their titles or their authors. You might think there is no upside to treating them that way, but you would be wrong. The upside is that the library saves the cost of cataloging all those monographs separately, which could amount to a great deal of money if we are talking about an ambitious, large, long-running series such as *Twayne's World Authors*, which returned nearly 1,400 hits at Amazon.com's website. (Twayne's issues more than one literary series and they are now online, available from Gale.)

Conclusion

To go back to the beginning, when is a monograph is a monograph? When

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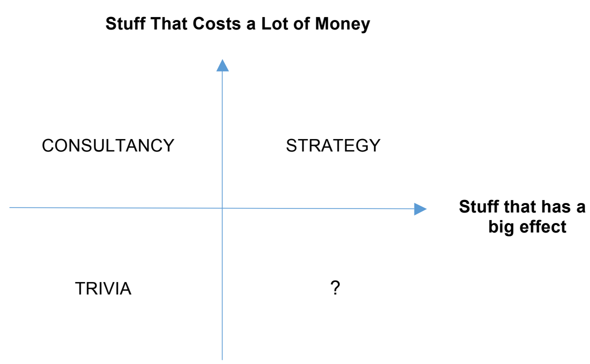
plots "stuff that costs a lot of money" against "stuff that has a big effect" (see figure 1). While it is clear from this diagram that Sutherland has little use for professional consultation—at least in terms of the bang organizations get for their buck—he does explicitly stress that strategic planning and its subsequent execution, while expensive, often lead to good, and sometimes extraordinary results. As the lower portion of the diagram indicates, trivial pursuits are unlikely to be worth any organization's time, no matter how low the cost, but Sutherland is particularly enthusiastic about the "fourth thing": activities that cost little, but which sometimes lead to "success that is absolutely out of proportion to their expense, their effort, and the disruption they cause." He maintains that most organizations do not do enough to foster and support this kind of tactical activity that can often result in disproportionately large and positive effects. Several contributors to the TED blog for this talk have taken Sutherland's bait and given names to this activity, among them: simplicity, mastery, "signifia," the obvious, the emotion, Occam, quintessence, and elegance. From a management or planning point of view, I would like to introduce a different perspective on this "fourth thing."

Figure 1 – Approaches to Organizational Planning and Innovation



(Source: Rory Sutherland, "Sweat the Small Stuff," *TEDSalon London*, April 2010, www.ted.com/talks/rory_sutherland_sweat_the_small_stuff (accessed Oct. 23, 2014).)

The 2CUL Technical Services Initiative

Conceived as part of a broad strategic undertaking to create a "transformative and enduring partnership between . . . two great library systems," the 2CUL Technical Services Initiative (formerly Technical Services Integration), or 2CUL TSI, aims to create a strong collaborative alliance between the technical services operations at the Columbia and Cornell University Libraries.[2] While this effort began as a strategic imperative, the tactical planning for TSI relies heavily on what we consider a "middle-out approach."[3]

By middle-out, we mean that the operational goals and steps required to build the alliance—for instance, the most promising ways in which to collaborate and how best to approach this sharing of staff and expertise—are identified and tested, incrementally, by those staff members who know the functions best and are in a position to act on their findings. In most cases, these are unit supervisors, functional coordinators, and other key individuals who are not necessarily technical services (or library) administrators. This kind of tactical brainstorming, tinkering, experimentation—whatever we care to call it—represents, it seems to me, Sutherland's fourth thing. The mandate for TSI is strategic; defining the specific elements of and tactical approaches to TSI is something else, something akin to what we often call empowerment. This term can be slippery and even controversial, so for the purposes of my current argument let me define Sutherland's fourth thing more precisely as the leveraging of skills of those dedicated staff who know the nitty-gritty of today's library operations best and encouraging these individuals to seek, develop, and implement ideas. The middle-out approach helps to counteract what Sutherland claims is "the tendency of the organization or institution . . . to deploy as much force as possible, as much compulsion as possible, whereas actually the tendency of the person [within that organization or institution] is to be almost influenced in absolute reverse proportion to the amount of force being applied."[4] In this way, those involved in engineering TSI are aiming to straddle the horizontal line on the right-hand side of Sutherland's conceptual model, that boundary between strategy and the fourth thing, in order to maximize the strategic, tactical, and operational effectiveness of this unique collaborative effort.[5]

Automated Technical Services

While the middle-out approach for TSI was intentionally chosen as a tactical planning methodology for the project, actuation of the fourth thing need not be mandated. In most cases in fact, as Sutherland suggests, forcing this kind of empowerment can be counter-productive. Ideally, the fourth thing just seems to happen. How so?

In the wake of a library management system migration several years ago, Cornell faced the painstaking task of rebuilding the library's input and output protocols for automated bibliographic data transfer: authority record loads, export of catalog records to OCLC, and so forth. While the periods leading up to and immediately following a major system migration are inevitably stressful and often vexing, the need to develop (or re-develop) routine processes creates an opportunity to regard things differently, to rethink long-standing assumptions and procedures, and to tinker with the status quo. Paradoxically, it is in the scramble to restore smooth-running operations that we suddenly "find" time for this kind of review, as we must make a virtue of the necessity to reconstruct workflows. In this case, however, the vigorous and creative partnership between Cornell Library IT and Technical Services did not end with the post-migration recovery. With newly written automation scripts in place, Cornell programmer Peter Hoyt remarked that running, monitoring, and routinely tweaking these scripts seemed to be a trivial use of his programming skills. He proposed instead to devise a way for technical services staff to initiate and monitor these jobs themselves. Such a division of labor would allow the staff who had the greatest stake in the results of these automated operations to execute the scripts and review the results at a time that was best for them, while

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it is separate and complete, and not connected to other monographs that also bear the same title. When is it a serial? When its publisher connects it to a group of monographs by giving all of them a group title and continues adding more items to the group with no end in sight. So, are the thousands of Kindle Unlimited titles merely thousands of monographs or are they thousands of parts of a serial/series titled *Kindle Unlimited*? Your guess is as good as mine. How libraries decide to buy them might not be a matter of life and death, but it demands a practical answer that works organizationally as well as having useful consequences.

References and Notes

1. *RDA: Resource Description and Access* (Chicago: American Library Association; Ottawa: Canadian Library Association; London: Chartered Institute of Library and Information Professionals, 2010-), GL-21.
2. In my *American Heritage Dictionary*, 3rd edition (1994), book and volume share one of their several definitions whereas *title* is defined as the name of a book or other type of resource. In my experience, however, librarians often refer to "titles" as if it meant the same thing as "books." The word *monograph* is defined as a scholarly book or article on limited subject matter, giving it both broader (including articles) and narrower (limiting its subject matter) scope.
3. This is a hypothetical example, although many years ago, your columnist once owned a set of three hardcover books fitting this description.
4. *RDA: Resource Description and Access*, GL-35.
5. Ibid.

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freeing more of Hoyt's time to develop new, often more complex and elegant automated routines.

This insight led first to Hoyt's creation of a Unix shell that allowed tech services operators to invoke programs remotely, and later to the development of a web-based set of tools that permitted this same staff to execute complex queries on Voyager data, edit large sets of MARC records, move these sets in and out of the system, create files of problem records ("kick-outs") for distribution to expert bibliographic troubleshooters, and interact with other technical services batch-processing software such as Terry Reese's MARCEdit and Gary Strawn's Record Reloader and Location Changer software. This new division of labor, brought about through informal collaboration between IT and technical services, gave birth to a Batch Processing Unit, an automation operation within Library Technical Services (LTS) in which seven staff members now participate, led by Hoyt's current primary collaborator in LTS, Gary Branch. Hoyt, meanwhile, rather than devoting a not insignificant portion of his advanced technological skills to running, monitoring, and tweaking routine jobs over a period of several years, has been able to work with LTS on a series of innovative developmental initiatives. These include the Integrated Tool for Selection and Ordering for the Cornell University Library (ITSO-CUL), software out of which OCLC's WorldCat Selection later grew and, in cooperation with the Columbia University Libraries, the Pre-Order Online Form (POOF!), an automation tool that eliminates most of the manual steps required to place firm orders for items in any format.[6] We estimate that the incorporation of POOF! into Cornell's regular acquisitions workflow has saved approximately two FTE of ongoing labor effort since its general implementation a couple of years ago.

None of these ideas were generated and executed as a result of a consultant's report or strategic planning, and they were certainly not motivated by trivial concerns. Rather, the critical factors in their development were chiefly time and latitude: granting the principal players time to explore their ideas and the leeway to act on them. Since the system migration had already forced a significant allocation of time for close analysis of the status quo and its reinvention, it was simply a question of preserving that allocation of effort and encouraging those directly involved in the hands-on work to continue to use that time in the manner they deemed best for the overall operation. In other words, the administrators of both library divisions blessed this grassroots initiative and continue to support, without micromanaging, the work of those involved in this productive internal partnership.

Diogenes and Alexander

It is too early to tell how successful the 2CUL Technical Services Initiative, driven by a middle-out approach, will be in the long run. Moreover, although adequate time and latitude were crucial for the eventual transfer of routine batch record processing from Library IT to LTS, a certain amount of serendipity was a key factor as well. As Hoyt recently remarked: "For technical reasons I wanted to match the tools with what needed to be done. It came together for both reasons [sufficient time and latitude], but we've been lucky to have a good mix of personnel involved."[7] I do not believe that such success stories are exclusive to Cornell: they are just examples I have ready to hand. In fact, I expect that most library leaders have similar tales to tell about leveraging opportunities and skills and encouraging staff to act, as independently as possible, for the greater good of their organizations or the collaborative arrangements in which their institutions are involved. It is also important to understand that I am not advocating a free-for-all, in which anyone in any organization is given the time and leeway to do anything at all. What I *am* recommending is that, as often and as much as possible, we must find the time and grant the administrative latitude for dedicated staff who have demonstrated consistently good judgment, a proven aptitude for responsible communication, and a solid understanding of the mission and strategic vision of the library to develop and implement ideas that could lead to results that are "absolutely out of proportion to their expense, their effort, and the disruption they cause." What I am advocating is a greater coalescence of the power of strategic planning and leadership with the power of Sutherland's fourth thing, with the two functioning in cooperation with rather than in opposition to each other, to effect big change and harmonious progress.

I readily admit, however, that the psychological empowerment required to set the stage for the fourth thing is not as easy to instill as we sometimes assume.[8] Empowerment, by its very definition, requires a relinquishing of power by one party, a willing loss of control, as well as an acceptance of responsibility by those charged to act.

Moreover, it is not a task, but a praxis, a *modus vivendi* for workplace relations, an acculturation of collaborative thinking across ranks that takes time to develop, but is absolutely essential for leveraging the power of the fourth thing. It might be useful to recall in this regard the meeting of Diogenes of Sinope (a.k.a. Diogenes the Cynic) with Alexander the Great in the 4th century B.C. According to the story, Alexander, on a visit to Corinth, was greeted by statesmen, philosophers, and other local VIPs who sought to pay homage to the great leader. Given Diogenes' reputation for eccentric brilliance, not to mention Alexander's colossal ego, the latter was surprised not to see the philosopher among the crowd of local luminaries. Alexander therefore sought out Diogenes and found him lying in the sun in nearby Craneion. The monarch, accompanied by his entourage, approached Diogenes, but in doing so he placed himself, without thinking, between Diogenes and the sun. Alexander introduced himself, greeted Diogenes magnanimously, and asked what he could do for the philosopher. "You can step aside," Diogenes replied, "you're blocking my sun."[9] Those of us whose job is to lead technical services through increasingly stressful times would do well to recall this story on occasion. While it is unrealistic for technical services staff to solve every problem without administrative muscle and direction, we can at least be careful not to block each other's light.

Note: The author wishes to thank Cornell's Gary Branch, Adam Chandler, and Peter Hoyt, and Columbia's Kate Harcourt for their input and influence on this essay.

References and Notes

1. Rory Sutherland, "Sweat the Small Stuff," *TEDSalon London*, April 2010, www.ted.com/talks/rory_sutherland_sweat_the_small_stuff (accessed Oct. 23, 2014).
2. Columbia University Libraries and Cornell University Library, "2CUL," www.2cul.org (accessed Oct. 23, 2014).
3. Kate Harcourt and Jim LeBlanc, "Planning from the Middle Out: Phase 1 of 2CUL Technical Services Integration," *Collaborative Librarianship* 6, no. 1 (2014): 36-41.
4. Sutherland, "Sweat the Small Stuff."
5. I am referencing here three of what R.M. Kanter identifies as the five "levels of integration" required for successful organizational alliances: the strategic, the tactical, the operational, the interpersonal, and the cultural. See R.M. Kanter, "Collaborative Advantage: The Art of Alliances," *Harvard Business Review* 72, no. 4 (1994): 105-106.
6. Cornell University Library, "POOF! Pre-Order Online Form," http://poof.library.cornell.edu (accessed Oct. 23, 2014).
7. Peter Hoyt, personal conversation with the author, Sept. 17, 2014.
8. Psychological empowerment is the term used in the ClimateQUAL survey to reflect the "extent to which an individual feels they can contribute to their team" and have a "large impact on what happens" in the library. See the Association of Research Libraries, "ClimateQUAL: Organizational Climate and Diversity Assessment," www.climatequal.org/about/concepts/core-scales (accessed October 23, 2014).
9. Plutarch, *Plutarch's Lives*, Vol. VII, trans. Bernadotte Perrin (London: William Heinemann; New York: G.P. Putnam's Sons, 1928), 259. My apologies to those familiar with the original text and/or Perrin's translation for my modernized, colloquial, and considerably livelier rendition of Diogenes' response to Alexander's question.

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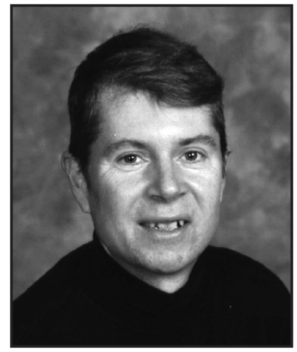
Making and Managing Metadata

Book Industry Study Group and Common Core Educational Taxonomy

By Tom Adamich


Tom Adamich

This column builds on my last column about the Book Industry Study Group (BSIG), an organization that works to standardize best practices and facilitate research and education for the book industry sector and others involved in print and digital publishing, including retailers, distributors, librarians, and other.[1] Here I will explore the work of its Subject Codes Committee and specifically the Educational Standards Taxonomy Working Group, one of the Subject Codes Committee's subgroups. I will explain how the Educational Standards Taxonomy Working Group is working to help the publishing industry better serve the needs of libraries from the metadata and technical services points of view.

Subject Codes Committee Reaches Out to Help Common Core

Because the mission of the BISG Subject Codes Committee is focused on the administration of the ONIX standard, many of the Subject Codes Committee's efforts have their foundation in supporting publishers and related groups, such as libraries, manage book metadata and maximize its utilization. ONIX (ONline Information eXchange) is "an XML-based family of international standards intended to support computer-to-computer communication between parties involved in creating, distributing, licensing or otherwise making available intellectual property in published form, whether physical or digital."[2] Currently, the three ONIX standards are ONIX for Books, ONIX for Serials, and ONIX for Publications Licenses (ONIX-PL).

According to the BISG website,

> BISG's Subject Codes Committee maintains the BISAC Subject Headings, Merchandising Themes and Regional Themes, and provides guidance on the implementation and use of the lists by publishers, retailers, and other interested parties.[3]

The BISG Subject Codes Committee has working groups that seek to further develop concepts identified by the main committee that may require further study or additional attention. Currently, the Subject Codes Committee has two working groups actively working on projects and initiatives: the Educational Standards Taxonomy Working Group and the Thema Working Group.

Educational Standards Taxonomy Working Group: Mission and Goals

The primary goal of the Educational Standards Taxonomy Working Group is to expand on the Common Core Working Group's recently completed *Recommendations for Citing Common Core State Standards in ONIX*.[4] This publication, which is directed to publishers and distributors, provides guidelines for using current ONIX fields to cite Common Core State Standards in book metadata. It was designed to enhance discovery of Common Core-aligned content by teachers and educators. The Educational Standards Taxonomy Working Group will create a taxonomy of key terms for describing book subject content related to Common Core, Next Generation Science, and other emerging educational standards. This group is co-chaired by Connie Harrison of Baker & Taylor and Patricia Payton of Bowker.[5]

An additional goal of the Educational Standards Taxonomy Working Group is to define the extent of the glossary and its structure (including term number limits). Furthermore, the Educational Standards Taxonomy Working Group will identify terms in the context of Common Core terminology and will make reference to related terms that may be used in and meaningful to other recognized standards. These term relationships will be expressed using scope notes and cross references, i.e., taxonomic structural tools that will assist in limiting the number of term relationship interpretations and provide added clarity for users.

By encouraging users of all types to take advantage of crosswalk opportunities with other metadata schemas, the impact of the Educational Standards Taxonomy will be felt beyond the ONIX implementation level. Because few libraries utilize ONIX to any great extent at this time, the crosswalk also will give technical services librarians additional avenues for possible implementation of other ONIX structures and processes in the future.

ONIX and Libraries: A Trend Emerges

Although the utilization of ONIX directly by libraries is limited, the trend toward libraries using ONIX datasets and structures (i.e., metadata created at the beginning of the bibliographic supply chain) is growing. Librarians are recognizing ONIX's ability to support data mapping to the MARC standard and increase the quantity and quality of base metadata. The Library of Congress Network and MARC Standards Office has developed *ONIX to MARC 21 Mapping*, which includes an ONIX to MARC 21 mapping table.[6] Publishers, in turn, see opportunities for the publishing supply chain to promote materials at both ends of the bibliographic supply chain (production and distribution).

One development in support of library use of ONIX was reported in 2010 in *Mapping ONIX to MARC*, by Carol Jean Godby, a research scientist at OCLC.[7] Godby updated her original report in 2012.[8] In the latter publication, she also explored the conceptual distance between ONIX and MARC and the possibility that *RDA* relationship designators may offer an advantage over the *Anglo-American Cataloguing Rules*, 2nd ed.'s difficulties in expressing relationships.[9] Relationships are a key element in ONIX.

Library of Congress projects using ONIX were discussed by Karl Debus-López and colleagues in "Bringing Publisher Metadata Directly to the Library: Use of ONIX at the Library of Congress."[10] The authors wrote about both the Electronic Cataloging in Publication (eCIP) Program's uses of ONIX (via LC's ONIX-to-MARC Converter tool) and the benefits of using ONIX in a large cataloging operation. They also described challenges in using ONIX to provide a balanced view of ONIX from the library perspective. Debus-López and colleagues outlined the bibliographic supply chain and noted that, in the past, libraries have done little to take advantage of information created in the supply side. Because this data is readily available throughout the publication production process, researchers at LC and OCLC (utilizing a partnership based on OCLC's Metadata Services for Publishers service) identified an opportunity to join forces to map ONIX data for books to MARC fields and subfields.

Using a Standard Generalized Markup Language (SGML) protocol, ONIX data feeds for electronic books received by the LC eCIP Program are mapped directly to the MARC subfield level. LC has received ONIX scans since 2002 and performed SGML-based data extraction and MARC mapping tests as early as 1996. Early success in extracting table of contents (TOC) data from the ONIX feeds validated the success of subsequent ONIX extraction efforts for other fields. By 2012, when the article was published, nearly 33,000 TOCs had been extracted by LC from ONIX data feeds. Later eCIP ONIX data extractions have added personal names, publisher information, the aforementioned TOC, and summary information to the eCIP records. LC catalogers then proceed to perform classification and subject analysis.

The use of the ONIX-to-MARC Converter tool also has revealed several deficiencies, most of which were found in the publisher-supplied information:

- ONIX data feeds for titles did not always contain summaries or TOCs.
- Complete number of authors or editors was different from the galley that catalogers were using to catalog the item.
- Title, series, and publication information did not always match the galley.
- A low percentage of titles submitted by the publisher to LCs eCIP Program were in the ONIX database to start.

Despite these minor setbacks, the overall success of LC's use of ONIX in the eCIP Program (via the ONIX-to-MARC Converter tool) has given both LC and OCLC an efficient metadata network from which to work directly with publishers to address data needs and work to solve future problems efficiently. In a recent phone conversation with Debus-López, he reported 25 percent of eCIP titles used ONIX data in FY 2014 (which ended Sept. 30, 2014).[11] LC is receiving ONIX feeds from more than 3,000 publishers. The ability to use ONIX descriptive elements means that the cataloging work is twice as fast. LC plans to include BISAC subject headings and

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Making and Managing Metadata

Book Industry Study Group and Common Core Educational Taxonomy

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audience level information (reading level, grade level, audience interest level). The results of this collaboration will certainly trickle down to libraries of all types as time progresses.

Julie Halverstadt and Nancy Kall reported on a project in the Douglas County Libraries, Castle Rock, Colorado that sought to use publishers' ONIX records for their catalog using a crosswalk and MarcEdit.[12] They identified four problems when using ONIX records created by nonlibrarians. The publishing industry does not generally use Library of Congress subject headings, relying instead on BISAC (Book Industry Standards and Communications) subject headings. The name headings provided are not consistent with those in the LC name authority control file. Publishers' book descriptions (often developed for display on the Web) can contain HTML tags as well as characters from the UTF-8 character set, both of which are outside the MARC-8 character set. Finally, because publishers do not have a history of working directly with libraries, libraries need to develop new workflows that manage receipt of publisher-supplied metadata.

What ONIX Utilization Means for Common Core

It is clear that any important information that can be identified and utilized within the ONIX standard will have ultimate benefits to end user populations. At the publisher level, publishers will be able to meaningfully tag content they are producing using Common Core-based language that will be understood by teachers, students, parents, and others who use the terminology on a daily basis.

Additionally, Educational Standards Taxonomy Working Group efforts will enable libraries to include ONIX-based metadata in their traditional library catalog structures and surface content in other repositories using the Educational Standards Taxonomy tags. One of my employers, Mitinet Library Services, has already begun to incorporate ONIX field structures into the cataloging records we produce for children's materials at the K-12 level. Under consideration are plans to incorporate Educational Standards Taxonomy tags at some level (either as part of the BISAC subject headings that we include or as separate thesaurus entries in the 650 field (Subject Added Entry – Topical Term) using a $7 to identify the thesaurus from which they originate).

The work of the Educational Standards Taxonomy Working Group and the use of ONIX metadata will continue to benefit libraries and provide a strong foundation for future metadata partnership efforts between the publishing and library communities.

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Continuities

The Map Redrawn

By Christian J. Burris

Christian J. Burris

On September 24, 2014, the news that traveled through the pathways of social media and e-mail speculation were confirmed: Swets Information Services had declared bankruptcy in the Netherlands.[1] In an instant, one of the largest subscription agents worldwide was out of business, forcing its customers to scramble to find other sources for its subscriptions and, in some cases, determine how prepayments for the upcoming renewal period could be recovered. The landscape would be changed as the reality of the absence of Swets was slowly realized.

More than one hundred years ago, Archduke Franz Ferdinand of Austria and his wife, Sophie, Duchess of Hohenberg, were shot dead by an assassin in Sarajevo, Serbia. The murder of the archduke, who was the heir presumptive of the Austria-Hungarian Empire, sent shock waves across Europe that led Austria-Hungary to declare war against Serbia, creating a chain of events that led to the First World War.[2] Following more than four years of death, destruction, and horror, an armistice was declared on November 11, 1918 that formally ended hostilities. However, the political boundaries of Europe were irrevocably altered as empires collapsed and new countries arose in their place. The landscape would be changed as the reality of the absence of Austria-Hungary was slowly realized.

Although these two events are separated by nearly a century and scope, they share one common thread. In the aftermath of both actions, the map that had been a verification of the existence of both entities would be redrawn in a dramatic fashion. The consequences would become a shared experience, remembered in the years that would follow. Experts would try to make sense of what had happened through the lens of history. But the recollections of the previous landscape would only become memories.

"Just Like Washington Crossed the Delaware, General Pershing Will Cross the Rhine"

We know that businesses can fail in our world, but in the environment of technical services those failures can take on a particular resonance. The area of serials processing has seen its share of changes as journals can move from one publisher to another, smaller publishers are acquired by larger ones, and titles change, merge, split, and disappear. But when an internationally recognized subscription agent goes out of business, the reaction is more deeply felt. Academic libraries that may or may not have been customers of Swets have

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felt the shock waves, whether directly or indirectly. However, this situation is not entirely unique.

The Faxon Company was a widely known subscription agent that had served public, academic, and school libraries since 1882. In 1994, Faxon was sold to Dawson Holdings and later to RoweCom in 1999, and both companies pledged to continue the quality that Faxon had built since its founding in the nineteenth century.[3] However, libraries began to feel unexpected secondary effects as Faxon was moving between companies. Reports began to circulate from electronic discussion lists, discussion groups, and e-mails about poor customer service. Libraries found it difficult to receive invoices in a timely manner; additionally, libraries also discovered that subscriptions had lapsed due to non-payment of these invoices by the vendor. In my own experience, contact with our customer service representative changed from pleasant conversation to guarded information exchanges. Finally, in December 2002, RoweCom announced they were having "financial difficulties" with Faxon that led to its ultimate collapse.[4] Events happened so quickly that employees of Faxon did not know any details.

In the end, the demise of Faxon became a clinical matter. Attorneys settled legal matters around the bankruptcy in the interests of their clients. Other vendors offered to take up the subscription lists of libraries to ensure a continuity of service. Publishers sent instructions about how to receive their products as alternatives to their customers. Librarians attempted to salvage their subscriptions and, in several instances, recover their lost money. There are several differences between the decline of both Faxon and Swets, but both share elements of uncertainty, and dissatisfaction from their respective customers.[5] The difficulties surrounding the end of both companies created a painful scramble that no one expected to handle.

"It's a Long Way to Tipperary"

For libraries and librarians, their objectives following the collapse of Swets had to shift quickly and dramatically. Rather than a routine operation to renew their subscriptions, librarians found themselves managing a crisis that had arrived as a very unwelcome guest. The challenge was how to bring a situation that had begun beyond their control into their grasps. Collection development and acquisitions personnel would have to collaborate as efficiently as possible to handle the tasks of transferring their subscriptions.

However, the remaining publishers and vendors were left with the challenge of meeting the needs of their clients. Those with existing relationships had a head start on those who had to establish new ones, but most were faced with an incredible volume of business that had come their way. The new business represented a boost to their respective profit margins, but the new customers also required a great deal of care. It would be easy for many libraries to adjust to the changes that had occurred, but these new agencies found themselves rebuilding the trust that had been damaged. It was more than the assurance that the company would not meet similar fate; rather, it was earning the confidence of these libraries in their new partnerships. In this manner, the role of renewal was more broadly defined and realized.

Another task associated with the new reality was to minimize the level of upheaval to patrons as much as possible. Certainly, the disruption of the new acquisitions process would be felt by library users, but the goal was to make the changes as invisible as possible. This could take the form of simple signage regarding the changes to complex patron education sessions that outlined the nature of the situation. Customer service is a hallmark of libraries and it exists in another relationship of trust that is placed in libraries by those who use them. Reliable information does not come solely from the materials housed in the building, but it also comes from the library staff that helps their patrons find what they need.

Libraries find themselves to be ground zero and no man's land at the same time. The buffer zone that places libraries in between external and internal customers is surrounded by the necessity of excellent customer service. Though the transition will be a painful one, it can be managed by the principles that have framed libraries as the trusted partners of their communities as rooted in the Code of Ethics of the American Library Association.[6]

"Keep the Home Fires Burning"

Days before the news of the bankruptcy of Swets became public knowledge; information about the *possibility* of its collapse began to spread rapidly across the Internet. Social media became the primary outlet for exchange, with Twitter taking the lead as the conduit of choice. Tweets began to appear from library staff who had received unexpected news regarding the financial health of Swets. The rumors continued to spread and eventually reached other communications channels, such as electronic discussion lists and personal e-mails. When the truth about the bankruptcy was finally acknowledged, one of the first confirmations came from a tweet sent by the company itself.[7] This represented a fundamental shift in the communication strategies of many organizations as well as the influence of social media as a whole. This level of interaction with the online community would have been regarded as fantasy a decade earlier. Thinking back to the collapse of Faxon years before, one could only speculate if the news of the company's impending bankruptcy would have been handled in a similar manner.

It is these relationships that librarians and their external partners have that are extremely special. When conversing with a particular customer service representative, that person can become a trusted extension of the librarian, reaching areas that cannot be reached during the regular course of business. Customer service representatives can reach into areas easily that librarians can only imagine to access, knowing exactly who to contact in a particular situation. They can take on various personas, such as superheroes, miracle workers, aces in the hole, the unsung heroes known only to a few who lend their talents to keep a library operating smoothly. If it were not for these individuals on the front line, librarians would face obstacles that could take more time to resolve. These are the trusted allies, and their absence could be keenly felt during these moments of reflection.

However, it is the emotional impact of the folding of these companies that really brings it home. The employees of a company in this position can be caught in the middle of forces beyond their control, and the new reality of their world can be overwhelming. Indeed after the company's tweet of its bankruptcy, Twitter users began acknowledging their support for Swets employees, wishing them well in the uncertain times they were about to enter. Former employees also offered their support, tweeting encouraging words within 130 characters. E-mails and telephone calls have followed accordingly, bringing words from current and former customers of Swets alike. There have been negative reactions to the collapse, but the positive responses have been much stronger. Just as the guns finally fell silent over Europe in 1918, the time to aid and rebuild had arrived in its stead. Today, the monetary cost from the bankruptcy has yet to be determined, but the cost to the people has taken an immediate precedence.

"Good-bye-ee!"

We have only begun to accept the impact of the absence of Swets from the library landscape. Similar situations have happened before in the history of libraries and librarians had to take up the mantle to ensure their subscriptions continued only with different actors. Vendors and publishers have taken on the challenge of working with libraries during this time of crisis, helping all of the parts land in the appropriate locations. And Swets employees are coming to terms with their own futures.

All of these situations can lead to one question: where do we go from here?

Because we are in the midst of realignment among the large powers of the library world, we do not yet have the luxury of waiting to see where the new boundaries will come to rest. Since we are in that moment, I can offer a few words of support to those involved.

- To Swets: You'll be missed. My library was one of your customers for many years and we parted on amicable terms several years ago. Still, I have fond memories of our business together and the people I encountered who represented you professionally and personally.
- To the librarians: Stay strong. We never expect these moments to happen in our line of work, but there are many people and institutions that have been through these turbulent moments. Seek them out for advice and support as you prepare to enter the next phase of an evolving marketplace.
- To the company personnel: Thanks and well wishes for the days ahead. As I had mentioned, the fond memories I have from working with Swets came down to the people who serves as its agents. Your professionalism was firmly grounded, and the personal touches formed strong bonds that made service calls seem more like reunions in scope. Though I cannot predict where the future will take you, I wish you happy landings and steady ground below your feet.

Swets is no longer a major player in the library scene, but both its presence and absence from that environment will be felt for years to come. It remains unclear if these events will continue to resonate a hundred years from now as a murder in Serbia did one hundred years ago. But for those who remember,

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Interfaces

Small Libraries – Old and New – Fill a Void

By Jean Weihs

Jean Weihs

The Old and Forgotten Libraries

Children in Canadian (and, I suspect, in U.S.) elementary schools learn heroic stories about the adventurers who travelled through vast unknown lands in the North American continent's interior looking for furs to send back to Europe and to find the Pacific Ocean. Furs brought wealth to British entrepreneurs and trading posts were established by the Hudson's Bay Company and the North West Company throughout this wide area. While some of the traders were illiterate, much of the work at fur trade posts required at least a core of educated employees for record keeping and other managerial functions. In 1794, Joseph Colen, a Hudson Bay Company officer, noted the importance this company placed on the ability to read and write because fur trade companies required extensive written records.[1]

The winters were long and in summer many men were out on the land acquiring furs from native tribes leaving the fort employees with much time to fill. "In 1803 Daniel Williams Harmon, writing from the North West Company's post at Fort Alexandria in the Swan River District, lamented that he would be virtually alone for the summer. 'However, fortunately for me I have *dead* Friends (my books) who will never abandon me, till I first neglect them.'"[2]

There were libraries in these far-flung trading posts. These collections were developed in various ways in the late eighteenth and early nineteenth centuries. For example, the London Committee of the Hudson's Bay Company from time to time sent out books to the various posts, for the most part "to Promote Virtue and Discourage Vice."[3] In 1778, this list included six books of Common Prayer, a book of sermons, and a nautical almanac sent to the Prince of Wales Fort. There is no indication the London Committee encouraged recreational reading of any kind, even on virtuous topics. A second way in which libraries acquired books was from the private collections of individual fur traders. Joseph Colen had a personal library of 1,400 volumes at York Factory in the 1790s. It appears that the North West Company acquired libraries for its trading posts in a similar manner.

Were there catalogues of these libraries in the trading posts? No catalogues of these first libraries exist today. If the catalogues that were produced later include the original holdings of these early libraries, it can be assumed the original holdings included very little "frivolous material"—only an occasional book of poetry or a comic play. Archival references imply that prior to 1821, when the Hudson's Bay Company absorbed the North West Company, reading was an activity of a small group in each trading post—the chief factors and traders for the Hudson's Bay Company and the senior trading partners of the North West Company.[4] Judging by the surviving books and archival references, it appears the trading post libraries were meant more for information, rather than entertainment. These senior men had the financial resources and access to the means of transportation to acquire personal libraries.

After the union of the Hudson's Bay Company (HBC) and the North West Company, formal libraries were developed and aimed at providing the residents in areas around the trading posts with reading materials with plans for the Red River Library made in 1816. As the library grew, by 1822 its collection was directed more to agriculture rather than the fur trade.

Fort Vancouver in the Columbia District had the earliest permanent or subscription library at a HBC post and was based on a small collection inherited from the North West Company's Fort George. Subscribers to the library met annually to decide the books and periodicals they wished to purchase. This order was sent by "express canoe" for 3,000 miles to York Factory on Hudson Bay where it was shipped to book dealers in London.[5] The following year this order was shipped back to Fort Vancouver following the same route. The last reference to this library in HBC records was made in 1855.

Subscription libraries were developed in other trading posts. The library at Fort Simpson in 1849 charged an entrance fee of £1 and an annual subscription fee of £1, which suggests the library users were affluent officers and clerks. However, in 1873 the James Bay Library charged a fee of 10 shillings for residents of Moose Factory and 8 shillings for others. The loan period for Moose Factory residents was one month and for loans to other posts, one year.

The York Factory Library, a subscription library, was formerly opened "for the benefit of all classes" on November 1, 1856, with 133 volumes and the publications of the Religious Tract Society.[6] By the time George Simpson McTavish (1863-1943) left York factory in 1889, the library had 1,900 volumes and an apprentice clerk acting as the librarian. The officers paid an annual subscription price of £1, the clerks ten shillings, and the mechanics and labourers five shillings. The library was open on Saturday nights for one hour after the ringing of the post bell. A candle provided the only light. It could be very cold because there was no fire in the library even in winter. McTavish writes "One night I happened to place the end of my pencil in my mouth and the graphite or lead adhered to my tongue. The preservation and condition of the books were marvellous, considering the varieties of temperature they were subjected to during the year."[7] There were practically no records of what books belonged to the library, where they could be located or determined as missing.

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The Map Redrawn

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those will be moments that will be exist outside of contemporary narrative. They won't be coming back, but we'll remember them from over there.[8]

Note: Headings for this article are the titles of popular songs during the First World War.

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Interfaces

Small Libraries – Old and New – Fill a Void

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McTavish devoted his spare time to stock taking, making a new catalogue, and classifying the books "according to my immature ideas, hampered considerably by my ignorance."[8] Copies of the catalogue were sent to other posts, which helped these posts manage their own list of purchases because it helped "those so isolated that any little oversight on ordering anything on their part meant a delay of one or two years."[9] Initially, McTavish was not a reader, but he called the library "his best friend" because since that time reading provided him with many happy hours.[10]

Small Libraries under Water??

After very many years of searching on September 7, 2014, Parks Canada finally found HMS Erebus, one of two ships (the other was HMS Terror) which were part of Sir John Franklin's doomed expedition in 1845 to find the Northwest Passage from the Atlantic Ocean to Asia. The ships were last seen entering Baffin Bay in August 1845. It appears they became locked in ice in 1846 and subsequently disappeared. Searches throughout the years have found the buried bodies of some crew members, but no indication of Franklin's remains or the whereabouts of the ships.

In an interview on CBC television, Ryan Harris, the lead underwater archeologist from Parks Canada who participated in dives to the ship, described the surprising preservation of the ship with some deck features still intact. He speculated that this was probably due to the coldness of the water. Harris stated it was too late in the year to do more explorations of the ship because the Arctic winter was approaching. He is looking forward to conducting a more intense exploration starting in spring 2015 and also remarked he hoped to find the ship's logs and other written documents because in 1845 paper was made from rags and not subject to the type of deterioration associated with wood-based paper. When the ship left dock in England for a multiple year voyage, it probably had books on board. I wait in anticipation—and hope—of his findings! [6]

Two Small Unusual 21st Century Libraries

There is a library on Cedar Lake in Minneapolis called The Floating Library.[11] It was a hand-made wooden structure with shelves—essentially a raft—eight feet square mounted on pontoons. In 2014, The Floating Library was redesigned by an architect. In order to visit the library and its collection, a boat ride by canoe or motor boat is necessary.

The library is stocked with approximately 80 titles. The books themselves are unique, primarily hand-made artist books donated by the artists. Because of the ever-present danger of water damage, some artists have waterproofed their books, such as binding them in Tyvek. There are four return boxes on land for people who have borrowed the books and do not want to, or are unable to, paddle back to The Floating Library to return them.

On the other side of the world comes a story that is not strictly a library story, but it has the essence of librarianship and I could not resist adding it to this column. In Teheran, Iran, a husband and wife team have turned their taxi into a rolling library/bookstore.[12] They call their outfitted taxi "Ketabranch," (Library on Wheels) and carry 40 titles (130 volumes) "stacked behind the back, shelved on racks over the passenger window, cluttering the dashboard, crammed into side pockets and stuffed in the trunk. When you pay the fare, you can buy a book. . . . They sell about 30 books a day . . . but they give books away to interested passengers who say they don't have a couple of dollars to pay for them." The United Nations recently chose the couple to receive an international peace award.

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4. In July 1821, under more pressure from the British government, which passed new regulations governing the fur trade in British North America, a merger agreement was signed with the Hudson's Bay Company, whereby the North West Company name disappeared after more than forty years in existence. At the time of the merger, the amalgamated company consisted of 97 trading posts that had belonged to the North West Company and 76 that belonged to the Hudson's Bay Company, *Wikipedia*, s.v. "North West Company," last modified Aug. 11, 2014, http://en.wikipedia.org/wiki/North_West_Company (accessed Nov. 11, 2014).
5. Payne and Thomas, "Literacy, Literature and Libraries in the Fur Trade," 47; *Wikipedia*, s.v. "York Factory," last modified Sept. 20,

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2014, http://en.wikipedia.org/wiki/York_Factory (accessed Nov. 11, 2014) has a map showing the route of the "York Factory Express."
6. Payne and Thomas, "Literacy, Literature and Libraries in the Fur Trade," 49.
7. George Simpson McTavish, *Behind the Palisades: An Autobiography* (Victoria, B.C.: E. Gurd, 1963), 61-63.
8. Ibid., 61.
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Maxwell, Robert L. *Maxwell's Handbook for RDA: Explaining and Illustrating RDA Using MARC 21.* Chicago: ALA Editions, 2013. 900 pp. Includes bibliographical references and index. ISBN 978-0-8389-1172-3. (softcover) $98.00.

Robert Maxwell's new book is a successor to his influential manual on Anglo-American cataloging rules. The new book is subtitled "Using MARC 21," which marks its focus as a work for use in our current environment, but Maxwell also shows an unusually acute awareness of the limitations of MARC as a vehicle for *RDA*.[1]

There is an excellent introductory chapter giving the historical context for the current state of play: the *FRBR* apparatus, its relationship to *RDA* (where one ends and the other begins), and where ISBD fits in.[2] He notes early on that a "major philosophical change" from the *Anglo-American Cataloguing Rules*, 2nd ed. (*AACR2*) is "cataloger judgment" (viii). In practice he moderates this view in the light of our need to share catalog records.[3]

The book broadly follows *RDA*'s chapter structure. This does mean that the thread of the argument will be logical only to the extent that the sequence of rules in *RDA* itself is, and the reader will need to be alert to that fact. It also means that the book needs a good index, and fortunately the one provided is excellent. I was able to find my way to most topics fairly quickly, a rare exception being the absence of the word "qualifier"—you need instead to look up "additions to" under "authorized access points".

A series of appendices is included dealing with specific formats, each furnished with a set of sample records. These are useful as an orientation exercise to walk catalogers specializing in those formats through how to apply *RDA* reasoning to their materials, but they should not be regarded as a substitute for more comprehensive training materials. For instance, certain kinds of format-specific data, such as geographic coordinates, are not covered.

The book consciously goes well beyond the core *RDA* elements. It takes into account the Library of Congress Program for Cooperative Cataloging (LC-PCC) Policy Statements (PSs) available at the time of writing, but inevitably it does not cover the most recent developments in certain areas, the most obvious being the new guidelines on undifferentiated names. Future editions are promised.

The text unmistakably shows the hand of an experienced educator who knows what kind of help practicing catalogers will need. For example, he includes a very helpful section on MARC coding for parallel titles to go with his explanation of how the *RDA* concept of a parallel title is different from the *AACR2* one (81ff.). Similarly, he is careful to explain the difference between leaves and pages, and there is an excellent section on date coding for name authorities (260). Tricky topics such as changes of responsibility within the same work are well handled (609f.).

There are many places where both the letter and the spirit of *RDA* are illuminated. This is particularly so in Maxwell's treatment of the areas where *RDA* decisively breaks with *AACR2*. Perhaps the most important of these is his discussion of *RDA* authorized access points, which he warns us not to assimilate to *AACR2* uniform titles (433ff.).

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As is perhaps well known, he differs with LC over its *AACR2*-like treatment of language expressions (560f.), and several of his examples, such as the one in fig. 9.69 showing the treatment of an analysis of Pope's translation of the Iliad, demonstrate the value of his approach (660).

The formulation of work and expression access points continues to be a vexed problem in *RDA* practice, and here Maxwell lays down some good principles without necessarily solving all of the practical difficulties catalogers will encounter in applying them. He gives a very clear explanation of additions to authorized access points for works on page 517 but does not attempt to address the formidable difficulties entailed by trying to make an authorized access point like "Paris" unique across a database the size of WorldCat.

Maxwell is a strong proponent of the *FRBR* entity-attribute-relationship model and his thorough and scrupulous treatment of its application in a MARC environment is an important contribution to our understanding of this area. A cataloger looking for guidance on using the 3XX authority fields, as well as on the principles underlying the construction of name and place headings under *RDA*, would do well to begin with chapters 3-6 of this book. It is noteworthy that when he moves on to describing works and expressions in succeeding chapters he gives equal weight to recording their attributes and relationships. In several of his examples, he makes a strong case for encoding this information in authority records. We see, for example, the director of a film recorded in an authority in fig. 9.33, as well as a reference to a novelization (625).

In advocating these practices Maxwell has an eye on the future. He observes that under current practice it is common to record work and expression relationships in bibliographic records, but it is clear he hopes this will change. He also foresees a time when machines can differentiate headings on the fly, reducing the need for manual heading construction.

Maxwell is very lucid on all aspects of *RDA* relationships, beginning with the instructions regarding *FRBR* Group 1 relationships in *RDA* Chapter 17 which he describes, with some degree of understatement, as being "not very helpful" in the current MARC environment (596). He is good on supplementary materials (644ff.), including the issues that arise with music and continuing resources, and on relationship designators.

The book is liberally supplied with thoughtfully chosen examples that are referenced to points that Maxwell makes in the text. At times they bring to the surface issues on which I would have liked Maxwell to stake out a more explicit position. For example, fig. 9.65 shows a 775 structured description field used to relate a revised edition to its predecessor, and no common authorized access point is given (658). I would have been interested to hear Maxwell walk through the relative merits of each approach for this specific case.

Maxwell is keenly aware of the incongruities that can emerge when trying to give *RDA* structures expression in MARC. An example is his criticism of the continued use of the 130 field (Main entry – uniform title) in preference to 730 field (added entry – uniform title). 1XX (Main entry fields) designates creatorship, he says, and a work cannot be its own creator (603). There is at least one other instance where I would have liked him to press home his argument about MARC definitions. In noting that expression dates are coded in $f of the field giving the authorized access point, he remarks that the work date is "usually" given in parentheses without further subfielding (553f.). This is helpful advice, but it may have been better still to advocate a specific practice for distinguishing work and expression date qualifiers. MARC, which predates *FRBR*, still quite unhelpfully defines $f as "date of a work," and this dissonance has been known to cause trouble.

Maxwell's occasionally heterodox positions, rarely less than cogently argued, invite the reader's engagement and reflection. It is possible to be persuaded by his views on language versions, for example, without necessarily following him on conventional collective titles. This is a book to be talked about as well as read.

Maxwell's Handbook for RDA weighs in at exactly 900 pages. I noticed a minor proof-reading error in the example at the top of page 854, but it is otherwise a sturdy and polished production, and the binding looks as if it will stand up to the frequent use it is sure to receive. *RDA* would be in a better state if every cataloging department had a copy of this book.

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Chew Chiat Naun, Director, Cataloging & Metadata Services, Cornell University.

Mering, Margaret, ed. *The RDA Workbook: Learning the Basics of Resource Description and Access.* Santa Barbara, CA: Libraries Unlimited, 2014. [xix], 190 pp. + supplemental materials on CD. ISBN 978-1-61069-489-6 (softcover) $55.00.

Catalogers have been waiting with bated breath for help in learning how to use *RDA: Resource Description and Access* (*RDA*), the new descriptive cataloging rules from the international committee that brought us *Anglo-American Cataloguing Rules*, 2nd ed. (*AACR2*)—the Joint Steering Committee for Development of RDA, known earlier as the Joint Steering Committee for Revision of AACR.[1] Not only are *RDA*'s rules more complex than *AACR2*, they are written in even more arcane language than *AACR2*, they were introduced without the same kind of extensive training sessions supplied by cataloging leaders when *AACR2* was introduced, and they involve changes in MARC coding as well as in descriptive cataloging. All of this makes them even less easily grasped and interpreted than previous rules.

The RDA Workbook is divided into four parts: 1—FRBR, the Framework behind RDA; 2—RDA in the Real World: Preparing Bibliographic Records; 3—Creating Access Points and Understanding Authority Records; and 4—Implementing RDA into Your Library and Catalog. In addition, it has a list of acronyms, exercises and their answers, a glossary, and a bibliography of useful resources as well as an index and biographical sketches for the editor and contributors. (The six contributors are Ruth Carlock, Corinne Jacox, Casey Kralik, Melissa Moll, Emily Dust Nimsakont, and Deirdre Routt, all Nebraska librarians.) Excluding the figures illustrating *Functional Requirements for Bibliographic Records (FRBR)* concepts in part 1 and management matters in part 4, *The RDA Workbook* has 66 illustrative figures showing everything from the three new MARC fields covering content, media, and carrier types to examples of relationships between persons, families, and corporate bodies.[2]

The information about *FRBR* in part 1 has been available for several years and is not new, but it is a necessary introduction to any manual explaining *RDA*. Also, the explanations are followed by a series of exercises testing the reader's understanding of *FRBR*'s basic concepts, such as work, expression, manifestation, and item. In addition, there are "quick guides" to *FRBR* and *Functional Requirements for Authority Data (FRAD)* attributes and elements, to *RDA*'s chapters, the *FRBR* work, entity, manifestation, and item attributes, and the RDA Toolkit, which are most helpful.[3]

In part 2, a set of ten highlights introduce important *RDA* fundamentals, such as the changes it makes to abbreviations and how it treats various core elements. Figures illustrate the highlights, which are then followed by more figures covering individual elements organized in an order likely to be followed by a cataloger creating an original catalog record for a sample resource. As the reader is walked through the process, mini-exercises test his or her understanding of the material being covered. Then, all the elements that have been discussed individually are put together into a full *RDA* record for the sample resource. This is followed by sample records for four different types of resources and a set of exercises.

Part 3 follows a pattern similar to part 2 covering the details of creating access points and authority records. It also has explanations of the elements of different types of name and title access points, figures illustrating the elements, exercises, and a quick guide to *RDA* authority records. These are not so very different from *AACR2* authority records, but they include much more data and require knowledge of a larger number of MARC fields new to standard authority records.

Part 4 steps back from the nitty-gritty of creating individual catalog and authority records with the new code and addresses administrative matters that must be faced upon making the shift from *AACR2* to *RDA*. Readers can use this part as a model or guide in implementing *RDA* for their libraries. It discusses alternative ways of introducing *RDA*, training staff, and making sure the library's catalog can accept the records and merge them successfully with previous cataloging, and it does not skip over the matter of cost. A model budget for *RDA* implementation (137) that could be adjusted to

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accommodate different pay scales. (The catalog librarian in the model budget is paid at the rate of $18 an hour and the library director is paid at the rate of $25 an hour. These pay scales seem unreasonably low. The value of the model, however, lies in the estimate of time spent on the implementation project—700 hours for the catalog librarian and 100 hours for the library director, plus a total of 950 hours on the part of three more staff members. These estimates seem close enough to reality to merit attention.)

The CD contains the exercises and their answers, the sample MARC records, the quick guides, and the budget worksheet from part 4. If used in teaching *RDA* cataloging, mounting these sections online using the CD can be helpful.

Slowly but surely, new cataloging manuals based on *RDA* are arriving in the marketplace, notably led by a new edition of *Maxwell's Handbook*, Andrew and Larsgaard's cartographic manual, Jones's serials manual, and, although it is a few years older, Weber and Austin's e-resources manual.[4] Among all these, *The RDA Workbook* is highly recommended for its coverage and approach, which facilitate teaching and learning the features and application of RDA as well as its implementation.

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Moniz, Richard, Jo Henry, and Joe Eshleman. *Fundamentals for the Academic Liaison.* Chicago: American Library Association, 2014. vii, 200 pp. ISBN 978-1-55570-967-9 (softcover) $60.00 (ALA members receive 10 percent discount); e-book edition $46.00, print/e-book bundle $68.00.

The premise of *Fundamentals for the Academic Liaison* is stated clearly in the preface of the book, "We will cover much in great detail in the book, but if forced to boil it down, we would say that this is the goal—establishing genuine and useful relationships with others" (vii). The authors deliver on that promise. Throughout the book they discuss various opportunities when liaisons could make contact with faculty, multiple print and technological methods to use, and how to perfect your marketing pitch, and preferred communication styles, but their main message always comes back to the importance of making and keeping relationships.

The layout of the book is quite attractive and standard: a short preface, 11 chapters (followed by citations), a conclusion, information about the authors, and an index. Each chapter includes at least one checklist (some have several) and a conclusion that summarizes the points of the section or chapter. The book includes multiple figures, as well, showing newsletter, website, and library guide examples.

The book is written in a fashion that is clear, concise, and easy to read. It is instructional but not overly scholarly in tone. I detected no errors in editing, indexing, or coverage, and I found the information to be timely and complete. Some chapters seemed more likely to become outdated quickly, particularly those focusing on online tutorials, embedded librarians, and library guides, but that is the nature of technology. The sections that I particularly enjoyed were those that are a bit more timeless: faculty/staff orientation, subject expertise, communication, accreditation, and evaluation. I found myself writing "Good idea" in the margins multiple times and starring sections to take back to my colleagues and share.

As with many of the "Fundamentals" series from ALA Editions, it is easy to see this book becoming required reading for librarians pursuing a career in academia. However, many librarians struggle with how to be a better liaison regardless of how long they have been in the profession. This book is chock full of ideas, advice, and reasonable goals to set for oneself. This would be an excellent book to share in chapters at continuing education or brainstorming events with colleagues to discuss how to enhance or expand liaison service.

Library literature is rife with information about library liaisons. *New Directions for Academic Liaison Librarians* (Chandos, 2012) by Alice Crawford looks to be similar in scope, but focused more on new ways librarians can expand their liaison roles. *The Machiavellian Librarian: Winning Allies, Combating Budget Cuts, and Influencing Stakeholders* (Chandos, 2014) by Melissa Aho focuses more on influence. There are also many articles on building liaison programs. That being said, I believe that *Fundamentals for the Academic Liaison* holds its own as a current, instructional resource for librarians.

All of the authors are current practitioners or professors in the field of library science. Richard Moniz has been a director of library services for Johnson & Wales University since 1997 and has taught for the MLIS program at the University of North Carolina Greensboro since 2006. Jo Henry is the information services librarian at Piedmont Community College. Joe Eshleman has been the instruction librarian at Johnson & Wales University Library—Charlotte since 2008.

I recommend this book to librarians just discovering the art of becoming an effective liaison and all other librarians looking to brush up on their skills, acquire organizational tactics for liaison work, become inspired to try new ideas, and be reminded of why being a liaison is an important part of their job.

Casey Duevel is Reference Coordinator/Reference Librarian at Minnesota State University, Mankato.

News From the Field

People

■ **Julia Blixrud** passed away in late October at the age of 59. Julia worked in a number of positions at the Association of Research Libraries for almost 18 years. Her greatest professional legacy is her work dedicated to open access to information for all.

■ Effective December 1st, 2014, **Celeste Feather** succeeded Tom Sanville as LYRASIS' Senior Director of Licensing and Strategic Partnerships.

■ **Glenn Patton**, Director, WorldCat Quality Management Division, retired December 31 after 34 years with OCLC. He helped guide generations of catalogers as a teacher, communicator, and leader in the library community through his work on numerous projects and initiatives at OCLC and on committees of the International Federation of Library Associations and Institutions (IFLA).

Of Professional Interest

■ The **National Technical Reports Library** (NTRL) (www.ntis.gov/products/ntrl), a service of the U.S. Commerce Department's National Technical Information Service (NTIS), is offering free public access to a searchable online database of approximately three million federal science and technology reports.

■ **OCLC** has issued ***Success Strategies for Electronic Content Discovery and Access*** (http://oclc.org/content/dam/oclc/reports/

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data-quality/215233-SuccessStrategies.pdf). This "Cross-Industry White Paper" by Suzanne Saskia Kemperman and colleagues identifies data quality issues in the content supply chain and gives recommendations for improved e-content usage, discovery, and access in libraries.

■ The **Bill & Melinda Gates Foundation**, a major funder of global health research, plans to require that the researchers it funds publish only in immediate open-access journals beginning in January 2017. Until then, grantees can publish in subscription-based journals as long as their paper is freely available within 12 months. But after that, the journal must be open access, meaning papers are free for anyone to read immediately upon publication. Articles must also be published with a license that allows anyone to freely reuse and distribute the material, and the underlying data must be freely available.

Publishers and Vendors

■ The **National Library of the Netherlands**, Koninklijke Bibliotheek (KB), has entered into an agreement with **OCLC** to add four important collections of digitized resources from Dutch-speaking countries to WorldCat. The content originates from the Netherlands, the Dutch East Indies, Suriname, the Netherlands Antilles and the United States.

■ The **Informa Healthcare** portfolio of 180 journals will be managed by **Taylor & Francis Group** as of January 2015. The move follows the transition of Informa Healthcare's books publishing business to CRC Press, a constituent part of Taylor & Francis Group, in 2012.

■ **Gale**, part of Cengage Learning, will make available content from its *Gale Digital Collections* to academic researchers for data mining and textual analysis purposes. Gale will deliver content upon customer request and in a cost-effective manner for the use of data mining and textual analysis. Gale is offering new textual analysis tools within the digital archives to assist researchers who may not have programming experience or digital humanities programs at their institution.

■ **Simon & Schuster** announced in November that it will no longer require libraries to display a "Buy It Now" (BIN) button in order to lend its e-books. Instead, libraries will be able to opt into or out of the BIN program.

■ **Amazon** and **Hachette Book Group** have ended the pricing dispute that the two have been waging since spring of 2014. In November, they jointly announced a multiyear agreement for e-book and print sales. The new terms will go into effect in early 2015, but Hachette has said that even before that time Amazon will restore its previous supply of Hachette titles and make them available for pre-order, as well as including them in promotions on the site.