

# Technicalities™

Information Forum for the Technical Services Professional

## Reality Check.....→

### Artificial Intelligence and Complicit Bias

By Philip E. Schreur

Artificial intelligence is here to stay with deep roots in almost every culture. From the automotons of the Middle Ages to Robbie the Robot in *Forbidden Planet*, humans have striven to imitate life through mechanical means. This artificial intelligence (AI) has been seen both as a savior and a threat and, with recent advances in computing, AI can be seen to compete more and more with a growing number of liveli-



Philip E. Schreur

hoods, including librarianship. But can we avoid the dystopia of *Metropolis* and learn to partner with AI to resolve some deeply rooted biases in how we approach access to information?

#### EMERAC

It is a scenario that has become all too commonplace—automation is meant to be an emancipator, not an executioner. But recently, in my COVID-19 exile, I came across this story. Two well-known institutions in New York City are planning to merge and, in a desire to become more efficient, their reference staffs will be replaced by a service built upon Artificial Intelligence (AI) called EMERAC. In interviews with staff, the reactions are both predictable and understandable: “No machine can do our job.” “They could never build a

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## Dollars and Sense.....→

### Censorship and Intellectual Freedom

By Sheila S. Intner



Sheila S. Intner

In today’s United States of America, issues of censorship and intellectual freedom in library collections facing those of us responsible for them have shot up from where they were back in the day when I practiced in a public library, that is, the late 1970s, or when I was elected to the American Library Association (ALA) Council in the 1990s, or when I directed an external Library and Information

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*Carlen Ruschoff*

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Jean Weihs, C.M.*

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

**Reading in the Time of COVID**

By Peggy Johnson

What does one do during a pandemic, especially someone who is semi-retired, is not working from home, and has no children needing schooling and safe activities to keep them occupied? Once upon a time, my husband and I used to go to the theater, attended concerts, visited museums, traveled, ate in restaurants, and hosted and attended dinner parties with friends. I engaged in various craft projects—knitting, sewing, embroidery, etc. I wrote letters (actual pen and ink) and sent cards to friends. I taught as an adjunct in the Masters of Library and Information Science program at St. Catherine University every few years. I wrote books and edited journals. During the clement months, my husband and I tended our garden. And, of course, I have always been a reader.

So much has changed, and yes, I know that everyone can say the same. We are all making do in the best way we can. As my mother says, “It is what it is.” We are managing a little socially distanced entertaining outside. We are spending more time than usual working in our garden. I have been unable to focus on knitting the complicated patterns I favor, but I started a crewel embroidery project, which is keeping me absorbed. I have not taught since the fall of 2019 and that is fine with me. I still keep writing and sending cards. I miss



Oscar

seeing plays and hearing music in concert halls and confess that online alternatives just are not as satisfying.

Two activities are filling my time, however. We got a new cocker spaniel puppy March 25. He was not yet seven weeks old, but the breeder wanted to get the pups to their homes quickly. Oscar is not technically a “COVID puppy,” since we purchased him in mid-February before the pandemic started, but we are part of the crowd who are filling their time training and being amused by a new pet—and Oscar is amusing and, like all puppies, challenging.

The second activity that consumes my time is reading. Reading totally absorbs me. My mother used to say

she had to call me three times before I surfaced from whatever book I was reading. The rest of the world and all the stressful aspects of life, society, and politics fade when I am reading.

I should have counted the books I have read since the middle of March, but it is too late to reconstruct. I am sure I have read more than 100 books in four months. I tended to read fiction in the past and have continued to devour an endless stream of mysteries. I have a preference for novels set in Great Britain and for British writers, although I have read every title by John Sandford and William Kent Krueger, both Minnesota authors. I like series in which the main characters evolve. I like what some call “cozies,” but my definition does not match that of *Wikipedia*: “a subgenre of crime fiction in which sex and violence occur off stage, the detective is an amateur sleuth, and the crime and detection take place in a small, socially intimate community.”<sup>1</sup> For example, Susan Elia MacNeal writes the Maggie Hope mystery series, which move between England, Europe, and the U.S. during World War II and have violence, serial killers, and darkly evil characters. Maggie Hope is involved with spy activities in Europe and crime detection in London. She is hardly an amateur sleuth.

If you are interested in cozy mysteries, however you define them, a useful website is “Cozy Mystery” ([www.cozy-mystery.com](http://www.cozy-mystery.com)). The site is extensive and offers “Soon to be

Released Mysteries, “New Mystery Releases, “New Mystery Series,” “Mystery Book Awards,” and much more, including an alphabetical list of authors, which leads to titles by each author.

One change in my reading habits has been to read more nonfiction. Books that I recommend are:

- *The Splendid and the Vile: A Saga of Churchill, Family, and Defiance during the Blitz*, by Erik Larson.
- *The Great Influenza: The Story of the Deadliest Pandemic in History*, by John M. Barry.
- *Tulipomania: The Story of the World’s Most Coveted Flower & the Extraordinary Passions It Aroused*, by Mike Dash.
- *Salt: A World History*, by Mark Kurla.
- *The Body: A Guide for Occupants*, by Bill Bryson.
- *The Pioneers: The Heroic Story of the Settlers Who Brought the American Ideal West*, by David McCullough.

Another change in my reading habits is that I tend to read fiction on my tablet, using a Kindle app. It is easier to read when I trot on the treadmill, feels more portable, and I do not lose

my place if the bookmark falls out. Plus our public library has a seemingly endless supply of fiction I can borrow as e-books, convenient as the library has only recently begun offering curbside pick-up services.

I would love to know what you are reading and if your reading habits have changed. Drop me a note at [m-john@umn.edu](mailto:m-john@umn.edu).

## Reference

1. *Wikipedia*, s.v. “Cozy mystery,” last edited June 11, 2020, [https://en.wikipedia.org/wiki/Cozy\\_mystery](https://en.wikipedia.org/wiki/Cozy_mystery) (accessed Feb. 20, 2019).

## Reality Check..... Artificial Intelligence and Complicit Bias

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machine to do what we do in here, there's too many cross references in this place." And the reaction from the institutions was not surprising as well, "The purpose of this machine is to free the worker from routine and repetitive tasks and liberate his time for more important work." What is perhaps most surprising to me is that this took place in 1957 in a movie called *Desk Set* starring Katharine Hepburn and Spencer Tracy.

EMERAC, or the Electronic MEMory and Research Arithmetical Calculator, is based on ENIAC, the Electronic Numerical Integrator And Computer developed during World War II to run complex numerical calculations. In 1957, *Desk Set* makes a prescient leap for us. Although first introduced into the Payroll Department to make complex payment calculations, EMERAC is modified to solve the more complex inquiries typically brought to a reference desk. Although the questions themselves are silly, the answers illustrate the thinking behind the limitations of AI at the time:

- "Does the King of the Watusis drive an automobile?" – EMERAC answers incorrectly due to an error in the data that has been input.
- "What are all the available statistics on Corfu?" – EMERAC answers incorrectly as the programmer entering the question mistakenly types "curfew" for Corfu.
- "What is the weight of the earth?" – This is the only answer that meets the reference staffs' approval. EMERAC responds

with a question of its own: With or without people? A reference interview!

At the close of the movie, once EMERAC has proven itself to be successful, we see the entire reference staff receiving pink slips. The scientist who has installed EMERAC says that this is a mistake! EMERAC was meant to make their lives easier and free their time for more in-depth research. He is doubly perplexed when he himself also receives a pink slip a few moments later. Of course, as this is a romantic comedy, it has to end well. It becomes apparent that the EMERAC in payroll has gone haywire and has sent a pink slip to everyone in the corporation. No one is, in fact, fired and additional staff will be hired in the Reference Department so that they can expand the work they do.

### Approaches to AI

Although AI is often considered as one monolithic entity, there are a number of different approaches within it. The first, more judgmental, terms applied were weak vs strong AI, or, the ability to perform a limited task(s) well as opposed to a more generalizable intelligence akin to an artificial person. A less pejorative set of terms in common use are Artificial Narrow Intelligence (ANI), Artificial General Intelligence (AGI), and Artificial Super Intelligence (ASI). In either case, the definitions are based on the complexity of the problem to be solved.

Over the past year, the Metadata Department at Stanford University has been experimenting with the ability to use ANI to assign topical terms to our Electronic Theses and Dissertations (ETDs). ETDs often receive minimal

processing at the institutions at which they were produced. The title of a thesis is descriptive of the content and the abstract provides needed detail. And so, in a department that is often understaffed and overworked, libraries save on processing time by not providing traditional subject access. Yet without consistent subject analysis, theses often are poorly integrated into a university's broader collection.

AI, and in particular ANI, has been gaining traction as a tool for change across nearly all businesses. In a recent article by Frey and Osborne, the probability of the work of library technicians being replaced by computerization is 99 percent, of library assistants is 95 percent, and of librarians is 65 percent, but what do these statistics actually mean? They reflect the probability that *current work* being done by library staff could benefit from the application of ANI. But instead of fearing job loss to AI, what if libraries could harness the power of AI to perform tasks they were not fully staffed to handle?

In January of 2020, the Stanford University Libraries explored the use of AI in the automated topical analysis of a subset of its ETDs. Two different AI tools were used: Annif, a tool for automated subject indexing and classification created by the University of Finland, and Yewno, a discovery environment created to transform information into knowledge. The chart in Figure 1 compares the results of these techniques applied to the first five of the ETDs. The first column contains the title of the dissertation, the next column includes the topical terms assigned by Yewno, the next two columns are the topical terms assigned by Annif based on two different learning sets (Omikuji Parabel and Wikidata TFIDF), and the

last column contains the Library of Congress Subject Headings (LCSH) terms assigned by the catalogers.<sup>2</sup>

The results were quite encouraging. The terms assigned were “out-of-the-box.” As of that date, there had been no tweaking either to the systems, the learning sets, or the vocabularies used to generate the particular terms. Although the catalogers felt the terms assigned were too broad, the possibilities were exciting. It is true that in this particular case the results could be duplicated by the catalogers in a few minutes. Where is the actual savings? But what if this technique could be applied to the digitized texts of resources in languages that the department could not handle (e.g., Gujarati), or be used to assign topical terms at the chapter level to books we had

already cataloged? This would not be taking work away from catalogers in the department, but rather expanding access to materials that we ourselves could not provide. As I thought about this more, however, I began to think about what it was we were trying to accomplish and the difference between Artificial Narrow Intelligence (ANI) and Artificial General Intelligence (AGI).

### Metadata as Power

Catalogers are very powerful people with a crucial position. By choosing what to catalog, they decide what will appear in the scholarly record. By deciding what level of cataloging to apply, they decide the quality and depth of access. By deciding what topical terms to apply, they decide

which are the most important themes in the resource (and perhaps, more importantly, which will not be made accessible in the online catalog). But the critical nature of their role goes beyond these preliminary choices.

Subject headings are a critical component of any cataloger’s work. The terms are carefully controlled, often appearing in large, complex structures. It takes years of careful study and application to assign these terms in the way they were meant to be used. Subject analysis can be a time-consuming process, resulting in greater cost per resource cataloged, and is often a key differentiator in what defines a role as professional within technical services. And although not required by entities such as the

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Figure 1. Comparison of Automated Topic Analyses and Cataloger Assigned Topics

Title	Yewno	Annif-Omikuji Parabel	Annif-Wikidata TFIDF	LCSH
Adaptive excitatory and inhibitory signaling in animal models of disease	Neuroscience Proteomics Electrical	Brain Epilepsy Neurons	g-aminobutyric acid Neurotransmitter Brain	Animals-Diseases Neural transmission Cerebrovascular disease Epilepsy
Advancing motor neural prosthesis robustness and neuroscience	Neuroscience Biomedical Coding theory	Signal processing United States of America Psychology	Body Mass Index Artificial neural network Artificial intelligence	Neuroprostheses Motor ability Brain-computer interfaces
Archaeology of reform at a German prisoner of war camp in a Canadian national park during the Second World War (1943-1945)	Archaeology Nuclear warfare Military Science	Prisoners of war Canada Prison camps	Prisoners of war Nazi Germany Canada	World War, 1939-1945—Prisoners and prisons, Canadian Prisoners of war—Germany Excavations (Archaeology)
Articulations of the Ineffable: Narratives, Engagement, and Historical Anthropology with the Muwekma Tribe of the San Francisco Bay Area	Indigenous studies California Nuclear warfare	Indigenous peoples Communities (organizations) Indians of the Americas	Native Americans Wild West San Francisco Bay Area	Ohlone Indians San Francisco Bay Area (Calif.) Ethnohistory
Asymptotics of Gaussian processes and Markov chains	Logic Information theory Mathematical & Computational;	Probability calculation Stochastic processes Mathematics	Markov chain Law of large numbers Asymptote	Gaussian processes Markov processes Asymptotic expansions

## Reality Check.....➔

### Artificial Intelligence and Complicit Bias

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Program for Cooperative Cataloging, LCSH, or Faceted Application of Subject Terminology (FAST) are clearly the vocabulary of choice within the cataloging community in the United States.

#### Complicit Bias

As early as 1971 in his *Prejudices and Antipathies: A Tract on the LC Subject Headings Concerning Peoples*, Sanford Berman wrote, among other things, to rectify errors of bias about headings for peoples that had been codified in LCSH.<sup>3</sup> But I think the larger issue is that any subject vocabulary will have a point of view whether or not it is explicitly stated. And through the creation of subject terminology, the power to name, catalogers control how information and discovery must be approached. As Brian Rosenblum has said in *Decolonizing Libraries*, cataloging is a method of knowledge control.<sup>4</sup> And by assigning terms from these vocabularies, catalogers are complicit in the sharing and enabling of the bias the vocabularies contain. An excellent current example is the use of *Illegal Aliens* as a subject term in LCSH and the desire to change this term to *Undocumented Immigrants*.

There are often very good reasons for the use of these monolithic vocabularies, however. By using a single vocabulary to rule them all, immense amounts of material from across all language families and centuries can be tied together. The collation of this material is a clear benefit to scholars, just as the use of a single vocabulary is a clear benefit to catalogers in terms of limiting the time needed to complete a bibliographic description (and so reducing the cost to the employer).

Because of the benefits and costs involved, our goal in the past has been to create a single, neutral vocabulary. Lately, it has been clear, however, that there is no neutral vocabulary and the bias implied by the vocabulary itself makes its benefits questionable.

Perhaps the use of AI can be of benefit to us in this dilemma? Instead of trying to perfect a single, neutral vocabulary to be used by all, we accept that all vocabularies have biases and apply terms from multiple vocabularies that can give multiple perspectives onto any resource. In a world of human assignment of subject terms, this approach would be cost prohibitive. But in the world of AI, with specific training sets and vocabularies, this should be possible. The benefits would be twofold. First, no one would be forced to use a vocabulary that they find offensive to do their research. But second, this technique would allow the researcher to do something that they have never been able to do in the past, explore a topic from multiple perspectives and gain insights they could never have achieved otherwise.

These capabilities may be beyond the original intent of EMERAC, but they are powerfully enticing. Far from being a threat to the work of catalogers and reference staff, they give us the ability to approach our work from multiple perspectives, perhaps not freeing us from bias, but freeing us from enforcing a single perspective.

#### References and Note

1. Carl Frey and Michael Osborne, "The Future of Employment: How Susceptible Are Jobs to Computerisation," *Technical Forecasting & Social Change* 114 (2017): 269-278.

2. TFIDF (term frequency-inverse document frequency) is a statistic that reflects how important a word is to document in a collection or corpus.
3. Sanford Berman, *Prejudices and Antipathies: A Tract on the LC Subject Headings Concerning Peoples* (Metuchen, NJ: Scarecrow, 1971).
4. Brian Rosenblum, "Decolonizing Libraries (extended abstract)," [http://brianrosenblum.net/2015/02/01/decolonizing\\_libraries](http://brianrosenblum.net/2015/02/01/decolonizing_libraries) (accessed June 19, 2020).

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*Philip E. Schreur is Associate University Librarian for Technical and Access Services, Stanford University, Stanford, CA, and can be reached at [pschreur@stanford.edu](mailto:pschreur@stanford.edu).*

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# Dollars and Sense.....➔

## Censorship and Intellectual Freedom

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Science program for Simmons University (then, Simmons College) at Mount Holyoke College, in the 2000s and taught about these issues in the program. Censorship and intellectual freedom issues are now (and should be) more than “add-ons” to other topics such as selection and ethics. They should be front-and-center issues concerning library collections for librarians responsible for them. Recent challenges to resources once thought to be among the most basic—for example, subscribing to *The New York Times* or to EBSCO’s digital service—prompted me to examine these subjects once again in this column.<sup>1</sup>

### Definitions: Do Differences Matter?

Is there a difference between intellectual freedom and censorship? To answer this question, I turned first to my trusty old *American Heritage Dictionary*. I was surprised that it had no listing for “intellectual freedom.” Its definition for censorship was as follows: “1. The act or process of censoring. 2. The office of a Roman censor.”<sup>2</sup> Expanding on these vague, cryptic statements, I looked at “censor” for additional details. That definition read, “1. One authorized to examine books, films, or other material and remove or suppress what is considered objectionable. 2. A Roman official responsible for supervising the census.”<sup>3</sup> That was a little clearer—at least, it used the critical verbs “remove or suppress,” although the second statement strayed far from the topic. Whatever the authors of the dictionary, issued originally in the 1960s, thought censuses had to do with censorship were far from my idea about it today.

Unsatisfied, I turned to the Web for more current definitions. Merriam-Webster’s website gave the following definition for “intellectual freedom”: “Freedom that allows people to think about or study what they want,” and added, “the library’s commitment to intellectual freedom,” as a phrase using the word.<sup>4</sup> That is double confirmation of what I expected to find—first, the description of the type of freedom and second, mentioning libraries in its example.

Then, I looked on the same website for censorship. It said: “1a: the institution, system, or practice of censoring, [with the example] ‘They oppose government *censorship*.’ b: the actions or practices of censors, *especially*: censorial control exercised repressively; *censorship* that has ... permitted a very limited dispersion of facts—Philip Wylie. 2: the office, power, or term of a Roman censor. 3: exclusion from consciousness by the psychic censor.”<sup>5</sup> Part b of the first of these definitions, though vaguely phrased, did include the word “repressively,” indicating it was in tune with my ideas about censorship; and the Wylie quote exemplifying of the word’s use added “limited dispersion of the facts,” which, while not as strong an expression as the older *American Heritage Dictionary*, was still in the same topical territory. The third option went back to those Romans, though not mentioning censuses, and the fourth added another type of limitation—the kind that the mind imposes on the human consciousness.

These definitions confirmed a significant difference between the two terms: censorship is taking something away from people—limiting, preventing, suppressing, and

excluding—while intellectual freedom is permitting something—the word in the definition was “allowing.” Here is a key to understanding more about them and how we, as librarians, might be prompted to respond to them.

### Consequences of the Difference

ALA is a strong advocate against censorship. It has an Office of Intellectual Freedom (OIF) devoted to it and in 1969, established the Freedom to Read Foundation—“a non-profit legal and educational organization . . . that protects and defends the First Amendment to the Constitution and supports the right of libraries to collect—and individuals to access—information.”<sup>6</sup> ALA/OIF sponsors a Banned Books Week that keeps track of challenges to library resources, and provides information, advice, and support for libraries and librarians being sued for providing challenged resources, often because those resources have been lent to children in both school media centers and public libraries. Sexually explicit resources often elicit calls for censorship, as do those covering racial matters and religious and political controversies such as abortion. But, if a controversy exists, resources involving it are likely to be challenged and, when they are, ALA and its affiliates are ready to step up to the plate in their defense, frequently submitting amicus briefs in the cases. Challenges often involve well-known popular titles, such as Mark Twain’s *The Adventures of Huckleberry Finn*, J. D. Salinger’s *The Catcher in the Rye*, and George Orwell’s *Animal Farm* have all been challenged in American courts, sometimes many times, and earned ALA’s

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## Censorship and Intellectual Freedom

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support in their defense.

It seems clear that intellectual freedom goes well beyond censorship. In practice, it means anyone, regardless of factors such as age, status, or residence, has the right to see and use any of the library's resources, and the resources could include any kind of content. Policies do not confine children to designated parts of the collections or prevent them from using library computers, and do permit them to borrow any of the resources, whether or not the resources were intended for their type of borrower. Similarly, adults can see and use any of the library's resources. It is a heady feeling to think that once someone enters the library, everything in it is available and there are no secret, hidden, or restricted sections. But those heady feelings can be scary to some people, for example, parents whose children can find resources the parents believe are harmful; people with strong biases against resources that conflict with their religious, political, or social beliefs; and people who believe it is their duty to protect others from encountering subjects they consider taboo.

### Conclusion

At the end of the day, intellectual freedom involves buying potentially controversial resources and taking the risk that doing so can bring on challenges as well as lawsuits. Censorship involves keeping them in use once they are in a library's collection, regardless of challenges on the part of people who object to their content.

Accomplishing these things is not easy. For one thing, librarians need to know their communities well and be well known within them. Part of

their jobs is to develop and maintain a relationship of trust with the people who use their libraries. Those responsible for library policies—boards of directors, trustees, or other governing groups—must be willing to stand behind librarians whose choices elicit controversy. And those librarians need to be ready to explain, in plain language, why their choices are justified.

### References and Notes

1. Several sources report on the decision by Florida's Citrus County Commission, which voted against paying for a digital *New York Times* subscription for the local library system, calling it "fake news." See, for example, Caitlin O'Kane, "Florida Officials Deny Public Library's Request for a *New York Times* Subscription, Calling the Paper "Fake News," *CBS News* (Nov. 5, 2019), [www.cbsnews.com/news/new-york-times-digital-subscription-citrus-county-florida-officials-deny-libraris-request-digital-trump-fake-news](http://www.cbsnews.com/news/new-york-times-digital-subscription-citrus-county-florida-officials-deny-libraris-request-digital-trump-fake-news) (accessed June 20, 2020). It does not appear that the library, which was providing print copies in the four regional libraries in Citrus County, was required to cancel the print subscriptions. The challenge to EBSCO and the Colorado Library Consortium was brought by a group of Cherry Creek School District parents, who alleged that EBSCO made pornographic material available through the databases it provides to schools and public libraries. The Cherry Creek district dropped EBSCO as its database provider, and within six months, the parent group agreed to dismiss the

suit. See Meg Wingerter, "Lawsuit Alleging Colorado Libraries Pushed Porn is Dismissed," *Denver Post* (March 8, 2019), [www.denverpost.com/2019/03/08/colorado-libraries-porn-lawsuit-dismissed/](http://www.denverpost.com/2019/03/08/colorado-libraries-porn-lawsuit-dismissed/) (accessed June 20, 2020).

2. *The American Heritage Dictionary*, 3<sup>rd</sup> ed. (New York: Laurel, 1994), 143.
3. *Ibid.*
4. *Merriam-Webster OnLine*, s.v. "intellectual freedom," [www.merriam-webster.com/dictionary/intellectual%20freedom](http://www.merriam-webster.com/dictionary/intellectual%20freedom) (accessed June 29, 2020).
5. *Ibid.*
6. Freedom to Read Foundation, [www.ftrf.org](http://www.ftrf.org) (accessed June 20, 2020).

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*Sheila S. Intner is Professor Emerita, Simmons College GSLIS at Mount Holyoke College; she can be reached at [shemat@aol.com](mailto:shemat@aol.com).*

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# Continuities.....→

## Cataloging Stranger Things: Pamphlets and Tarot Cards

By Ben Abrahamse



Ben Abrahamse

Right now, like so many people, I am working from home. And I am grateful to have work and to be able to keep myself and my family safe, but still—I pine for the stacks. Not just the romance of them (who does not like being surrounded by books?), but the work that is needed to keep them growing. There is plenty of cataloging and metadata work to be done during this period, in spreadsheets of e-book titles, institutional depositories, and Zoom meetings. But it is a different kind of work; tangibles have always been my beat, and I miss them sorely.

So in this installment of *Continuities*, I am going to beg the reader’s indulgence, and provide a brief retrospective of the work I have done in the past few years, and would be doing still, to catalog tangible materials. Instead of talking about the “mainstream” material that takes up most of my time and attention, I am going to look at a couple of the stranger and, dare I say, more fun things I have had the opportunity to work with.

### Pamphlets

Pamphlets, or realia, are small format works—ranging from a single folded sheet to around 50 pages—that are typically created for a particular cause, occasion, or place. They are not usually intended for general literary consumption outside of the specific circumstances of their creation. This often makes them an interesting challenge to describe and catalog, because

it requires the cataloger to determine and convey that necessary context in the record. At the Massachusetts Institute of Technology (MIT) Libraries, we have a large collection of pamphlet material related to art and architecture and, in 2019, we added to this collection a bunch of brochures and other material that one of our librarians had collected at the Biennale di Venezia (an art exhibition in Venice). Some of these pamphlets are relatively straightforward to catalog: like a book, they describe themselves and their purpose clearly with their title. For example:

Ghana freedom : Ghana pavilion at the 58th International Art Exhibition La Biennale di Venezia. [Accra, Ghana] : [Publisher not identified], [2019]

2 postcards : chiefly illustrations ; 15 cm.

Although lacking an imprint, thus requiring us to supply the details of its publication, the title statement and, in particular its subtitle, provides the necessary information for a user to understand the underlying reasons why this work exists and was collected. But providing this much explicit information on the resource itself seems to be the exception that proves the rule, particularly with respect to exhibition material. Another brochure from the 2019 Biennale provides a more typical example:

Indios antropófagos : a butterfly garden in the (urban) jungle. [Peru] : [Publisher not identified], 2019.

1 sheet : color illustrations ; 48 x 65 cm, folded to 24 cm.

This item—a single sheet folded to make a handy brochure—is intended to be held by the visitor of the Peruvia pavilion; when it is removed from that living context and preserved as part of a collection, its purpose becomes obscured. To make this item’s function recognizable to a user, the cataloger must supply additional information in the form of a note, which borrows text from elsewhere on the resource, to supply the missing information:

Accompanies an exposition of the same name, featuring Christian Bendayán and other Peruvian artists; “Pavilion of Peru, 58. Esposizione Internazionale d’Arte.”

Other materials from the same event are even more reticent. The materials we collected from the Japanese pavilion, an art installation called “Cosmo Eggs,” did not contain any reference to the exhibit or the Biennale at all. So they had to be brought

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together by the cataloger as a lilliputian collection, within the larger collection.

Materials from the Japan Pavilion at the 58th Venice Biennale, 2019. [Tokyo] : Artizon Museum, [2019]

3 sheets : illustrations ; 28 cm.

Contents: Exhibition in Japan -- "Cosmo-eggs" questionnaire -- List and configuration of the works composing Cosmo-Eggs.

Treating pamphlets at the "collection level," instead of describing them individually, is an effective way of making these materials discoverable and accessible to users. Because we so often need to supply information about the circumstances that led to these items being created, distributed, and collected, gathering them together—both intellectually and physically—is a common and useful approach, hence the ubiquity of the much-loved (or maligned, in some quarters) library "pam box." The Biennale pamphlets are already part of a larger collection of art pamphlets, and we analyzed them individually. Still, I wanted users to be able to find them all without having to sort through all of the art pamphlets to find them. So, I added a combination of a locally-scoped note (MARC field 590) and a series added entry (MARC field 830) to make these pamphlets appear and behave as if they were issued together in a series.

[Local note] Part of the Rotch Library collection of Biennale di Venezia pamphlets.

[Series added entry] Rotch Library

collection of Biennale di Venezia pamphlets ; 2019 Saudi Arabia.

A similar "collection level" approach to cataloging pamphlets can be used when the materials have already been brought together into a pam box. For example, we have a lot of pamphlet boxes that were filled with small materials and never given proper catalog records. They were, at the time, intended simply to be browsed by the user. Cataloging each pamphlet individually is prohibitively expensive. But since the librarians who assembled these boxes assigned Dewey Decimal numbers to them, we can use the classification number they assigned to create records for each box, to present them as a topical collection of pamphlets.

MIT Libraries collection of pamphlets on aluminum and the aluminum industry in the United States, 1933-1953.

18 pieces ; 21-28 cm.

Pamphlets collected by the MIT Libraries and originally shelved under Dewey Decimal numbers 669.7-669.71. Subsequently arranged alphabetically by author or title.

An added contents note could be used to record the individual titles and other relevant information such as issue date.

Pamphlet material is interesting to catalog because it requires the cataloger to really think about how the metadata being collected will be interpreted by the user. Just as with more common library materials, the goals are the same—to enable users to identify and

retrieve a work, provide them with a basic understanding of where the work fits into a broader topical context, and finally record basic information about the item's provenance. But pamphlets are typically produced for a specific purpose—to win an argument, explain a place, or accompany an event—and once they are collected, some of that original purpose needs to be collected by the metadata as well.

### Tarot Cards

MIT Libraries's Distinctive Collections Department has been assembling a research collection of tarot card decks, and I had the exciting opportunity to catalog the first hundred or so of them. As you might expect, tarot is not a type of material for which well-established cataloging standards exist, so part of the puzzle was just figuring out how they should be treated in a reasonably standardized way. To begin with: what basic category of information does a tarot deck represent? Or as a cataloger, working on assembling a MARC record, would ask: how do we fill out the Leader/06 byte, "Type of record"? A tarot deck is an object, a kit (or a collection of objects), a visual resource, and a textual resource; but the MARC format in its wisdom forces us to choose one. After interacting with material and doing a little bit of background research, I decided to treat tarot as fundamentally textual resources. Although text itself, the written word, is not necessarily required of a tarot deck, I was primarily influenced by the language that tarot artists and users employed to understand that a tarot deck functions as a text: it is "read" (though not necessarily sequentially) and understood in a quasi-narrative manner. In order, however, to try and

capture something of the liminal, boundary-crossing nature of the tarot, I made use of the *RDA* Content (*RDA* 336), Media (*RDA* 337), and Carrier Type (*RDA* 338) vocabularies.<sup>1</sup> So each tarot deck could be described according to vocabulary as:

336 ## \$a still image \$b sti \$2  
rdacontent  
336 ## \$a text \$b txt \$2 rdacontent  
337 ## \$a unmediated \$b 2 \$2  
rdamedia  
338 ## \$a card \$b no \$2 rdacarrier

A basic physical description comes next. The traditional tarot deck comes in a few basic formats, and typically contains 78 cards.<sup>2</sup> This is what a typical example looks like.

Melanated classic tarot [BF1879.T2 G67 2019]  
1 case (78 cards, 1 booklet) : color illustrations ; 12 cm

The tarot in our collection exhibit many subtle variations on this basic framework. The cards usually arrive in a case and are accompanied by booklets, bags (for storing cards, and drawing them out), and other ritual implements. These add-ons were occasionally challenging to describe and one deck was so small (each card measured 1 x 2 cm) that great care had to be taken to prevent it from being accidentally dispersed during processing.

The new arcana: tarot cards for modern times [BF1879.T2 F66 2017]  
1 case (27 cards, 1 instruction booklet, 1 die-cut sticker) : illustrations ; 13 cm

Wild moon tarot [BF1879.T2 W553 2019]  
30 cards : color illustrations ; 12 cm  
+1 instruction card (16 cm), 1 quartz crystal in mesh bag (approximately 8 x 10 cm)

Tiny tarot [BF1879.T2 B376 2018]  
1 container (78 cards) : color illustrations ; 9 cm

Once the deck has been described, we turn to the equally important cataloging task of providing access through author and subject headings. The term “author” did not strike me as an appropriate way to capture the relationship between a tarot deck creator and her or his work, as the “text” of the tarot is, for the most part, inherited by its creator. This is not to say that a tarot deck is not an original, creative work—just that the creativity does not reside exclusively in the words that appear on the cards. Instead, I used the term that I saw the creators of these decks most often using to describe their own role, “artist.” *RDA* defines this role as “an agent responsible for creating a **work** by conceiving, and often implementing, an original graphic design, drawing, painting, etc.”<sup>3</sup> This fit with my understanding in two ways. First, the creator was indeed creating a new “work” (in the *RDA* sense of “a distinct intellectual or artistic creation”); and second, the fairly broad definition of an artist’s work that *RDA* provides seemed to encompass the variety of methods of creating new tarot that I was looking at: illustration, watercolor, graphic design, collage, and typographic art. In some cases, it was possible to delineate two different roles associated with the production of a tarot deck: a designer

and an illustrator; in these cases I used “designer” and “artist.”

Finally, turning to subject access, it did not seem prudent to invest a great deal of energy trying to find specific headings in the Library of Congress Subject Headings (LCSH); instead I uniformly applied the subject heading “Tarot cards.” The astute reader will surely note that this is a bit of a misapplication of the vocabulary, as a topical and not a form/genre heading, it suggests a work *about* tarot cards, rather than an actual set of tarot cards. However, there currently exists no comparative term in the LC Form/Genre vocabulary. Furthermore a closer inspection of LC subject heading itself reveals that it was likely created to be used as a genre term, prior to the creation of the genre vocabulary.<sup>4</sup> I hope that at some future point this matter will be resolved within the LC vocabularies, and the uniform application of this subject heading across the MIT Libraries tarot card collection will make it easy enough to update our bibliographic records. This was the only subject heading that I applied to every record and in many cases it was the only subject heading applied at all. But in some cases, the artistic theme of the tarot was specific enough that I felt it necessary to account for it with an additional heading. I made liberal use of established headings following the pattern, “... in art” (e.g., “Night in art” for the *Tarot de la nuit*; “Monsters in art” for *The Little Monsters Tarot*).

## Conclusion

These two types of materials are different from each other, but they go together well to demonstrate a point about the importance of cataloging

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## Continuities.....→ Cataloging Stranger Things: Pamphlets and Tarot Cards

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work: it is a service that enables libraries to develop their collections in creative ways. While most of the new acquisitions that a library receives these days come with some level of associated metadata and can often be plugged into a library's collections and catalog in an automated or semi-automated fashion, acquisitions that do not conform, or that are not provided by well-established vendors or publishers, quite often need the care of a specialist to ensure that they are as discoverable and accessible as the more commercial material. As long as libraries want to collect stranger and stranger things, metadata librarians will need to figure out how to catalog them.

### 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- ).
2. The tarot has two divisions, called "arcana." The major arcana consists of 22 cards, the minor arcana of 56. A complete tarot deck will thus consist of 78 cards, though some decks contain only the 22 major arcana cards.
3. *RDA Toolkit: Resource Description & Access, Glossary* (Chicago: American Library Association, 2010- ). Note that *RDA Toolkit* is available only by subscription.
4. The "work cataloged" note of the Subject Authority Record (Library of Congress control number sh 90004769) points to a tarot deck, not a work about tarot decks, see Library of Congress Authorities,

<https://authorities.loc.gov/cgi-bin/Pwebrecon.cgi?AuthRecID=4834077&v1=1&HC=1&SEQ=20200723175029&PID=Rqfpa2JYOQIneCjcbhkgvwwznjQi> (accessed July 23, 2020); it is furnished with a "see also broader header" reference to "Tarot (Game)--Equipment and supplies." Incidentally that latter subject term bothers me—tarot is many things to many people but few view it as a game.

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*Ben Abrahamse is Cataloging Coordinator, Acquisitions & Discovery Enhancement, MIT Libraries, and can be reached at [babraham@mit.edu](mailto:babraham@mit.edu).*

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## Interfaces.....

### A New Beginning

By Jean Weihs, C.M.



Jean Weihs

In the first paragraph of my last column titled "The Coronavirus Column," I described the situation in Toronto and thought that by early July the pandemic would have been tamed or lessened substantially. I am unhappy to report that the coronavirus is still with us. Health authorities state they are unable to predict with any surety the length of the pandemic. Fortunately, the people I know or live near me are obeying anti-pandemic rules by wearing masks and passing others on a street or entering a building by keeping two metres distance. While the public libraries have partially reopened, it is much more complicated to use them. For instance: I could telephone or e-mail my local branch library to reserve a desired item that I found in the Toronto Public Library's on-line catalogue. A day or two later, I would receive a telephone call or an e-mail to say the desired item would be available at a branch library near my house

at a particular date and time. A staff member would hand the book to me at the library's entrance. Sometimes, my request is only one of many for a particular book and my name is added to the list of people requesting the book and I am told I will be notified when a copy is available for me. Because this procedure can be awkward and time-consuming I have decided to write columns based on the materials I have at home in my personal collection.

## Predictions

Reading through the many articles and journals that have been stored on the shelves in my house, I conclude that it is a big mistake to make predictions about the future of libraries and their place in society. Some people predicted that libraries housing books would disappear, such as the three people quoted in the October 2009 issue of *American Libraries*.<sup>1</sup>

- “When I look at books, I see an outdated technology, like scrolls before books.” (James Tracy, Headmaster, Cushing Academy, Ashburnham, Mass.)
- “Is screen the new paper? Will publishing houses go the way of the old-fashioned record store? Is digital delivery the new bookstore? Is Google the new library?” (Joni Evens, former book publishing executive)
- “The stereotypical library is dying – and it’s taking its shushing ladies, dank smell, and endless shelves of books with it.” (John D. Sutter)

It is now 12 years since these comments were made, but, even considering this fact, it must have been

years since Sutter was in a library. The last “shushing ladies” I remember were in the late 1940s. Before the current pandemic, which has kept many people in their homes and closed many non-essential services, the bookstore on my area’s main street was almost always busy, and there were always people sitting and reading or borrowing something from the library’s collection in the four branch libraries of the Toronto Public Library in my part of the city.

What will the world be like, and particularly North America, when the pandemic has run its course? Will the function of libraries change? The answers to these questions are difficult and probably impossible to answer with any certainty at this moment.

I have documents in my files that were published in the 1970s and the thing that strikes me most forcibly is the belief that the “new” product, service, or management change will happen much more quickly than actually proved to be the case. In many instances this new development did not happen at all or happened in a different manner than that originally predicted. Of course, this is a problem with much of publishing. Authors want to say something that will attract attention and publishers are more likely to print articles with audience-catching content.

For those interested in the history of library technical services and predictions made in the early 1980s about the future of technical services I recommend *Beyond “1984”: The Future of Library Technical Services*, which has 39 chapters contributed by different authors and gives a picture of various aspects of librarianship in the present and the future beyond 1984.<sup>2</sup>

## This and That

A part-time employee of the Nihonmatsu City library in Japan was arrested on suspicion of attempted murder after he injured four people in the library with a pocket knife. He became enraged when he was told by another library employee that he could not borrow any books because he resided in a different city. The books in the library were only for the use of the people who lived in Nihonmatsu.

If you are a dictionary lover, you might be interested in *The Oxford History of English Lexicography*, by A.P. Cowie (published in 2009). “The first volume traces the history of general purpose English-language dictionaries from glosses added to medieval manuscripts to the *Oxford English Dictionary* online. The second volume looks at specialized dictionaries.”<sup>3</sup>

One of the libraries I wish I could visit (but never will) is in the Monastery of Saint Catherine in the Sinai desert. Founded in the sixth century (between 548 and 565) it is the oldest continuously operated library in the world and it is also the second richest library on earth due to the number and value of its collection. The library was originally sponsored by Empress Helena, the mother of Constantine the Great. It contains the second largest collection of codices and manuscripts in the world including the Codex Sinaiticus, the biblical text dated to the year 345.<sup>4</sup>

“Librarians in a small town in northern France have discovered a previously unknown copy of the first folio of Shakespeare’s early plays—one

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## Interfaces .....

### A New Beginning

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of the world's rarest books."<sup>5</sup> Just 233 copies of the first folio of Shakespeare's works are known to survive. This folio contains 36 plays, nearly all of Shakespeare's output. Each copy of the folios is scrutinized for minute variations which might reveal the playwright's intentions. And this one is in good condition despite the lack of the title page and other introductory materials that had been torn off. However, after the folio was examined by experts knowledgeable about Shakespeare's works they confirmed the book's identity. One of the other folios was sold at Sotheby's in 2006 for US\$5.2 million.

Keeping library shelves in order has been a problem as long as I remember. This was particularly so in public libraries that usually placed books on open shelves where the library's patrons had easy access. These patrons frequently replaced a book they had taken from one place to another place—sometimes in another section of the library. I remember watching a woman take a book from a shelf and wander to another shelf some distance away where she found something more to her liking and placing the first book in the spot from which she had taken the second book. Every so often a library would decide their shelves had become too crowded and the space was needed for the accommodation of new materials. In the early days it was additional new books that needed shelving; later this space was required for other types of materials as these non-book materials became part of a library's circulating collection.

This problem is particularly pertinent to university libraries because of the research done by both professors and students that requires the

exploration of works written in the past with content that might seem to be out of date—but not to the professor or student involved, many of whom declare that large, readily available print collections are vital to research. It has been my experience that the exploration of books on shelves leads to important information in other sources. Footnotes and lists of references at the end of chapters can sometimes lead to further unexpected sources of information.

I came across an interesting column recently titled "Are You a 'Reader' When Listening to an Audiobook? Yes, of Course."<sup>6</sup> The author states that many people outside the library and publishing industries believe that listening to audiobooks is a form of cheating and really not the same thing as reading. Some believe that information is best restricted to its analog format. When Leonard Cohen donated a collection of his papers to the Thomas Fisher Rare Book Library in 2003, he stipulated that none of the contents should be digitized.<sup>7</sup>

Alberto Manguel sees libraries as having a defining triple role: as preservers of the memory of our society, as providers of the accounts of our experience and tools to navigate them – and as symbols of our identity.<sup>8</sup> However, in much of the British and North American world the number of public libraries has been decreasing and in some cases the public uses their resources for purposes unforeseen in the 20<sup>th</sup> century.

David Sax argues that information is best restricted to its analog format.<sup>9</sup>

That may seem archaic and slow, and it is surely less efficient, from a time perspective, than a Google search. But it is also a process of

discovery that leads the searcher to unexpected and revealing places. It requires more effort but may lead to more learning. It slows down the process of information absorption and encourages a connection between the text, document, and reader.

I agree with this statement. In my many years of doing research in preparation for writing a book or a column or a lecture, I found the resources in the University of Toronto Faculty of Information's library invaluable. The shelves were filled with books and journals related to libraries and librarianship. It was wonderful to find references to pertinent articles and books that would likely be housed in that library. It was very convenient that several sources of information could be laid out on a table for comparison in content. Alas, this library is no more despite the protests of many people (including me). The resources of the Faculty of Information's library have been added to the library shelves in the main library and reclassified with the Library of Congress Classification from the Dewey Decimal Classification used previously. I am told that the Library of Congress Classification has separated information previously allied so there is no longer any one place where materials on libraries and pertinent information can be found.

According to the Greek historian, Diodorus Siculus, one of the ancient libraries he saw in Egypt carried above its entrance the words "Clinic of the Soul."<sup>10</sup>

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- 9-10 (Sept./Oct. 2016): 46.
2. Peter Gellatly, ed., *Beyond "1984": The Future of Library Technical Services* (NY: Haworth, 1984).
  3. Mary Ellen Quinn, "Librarian's Library: Inside Nonfiction," review of *The Oxford History of English Lexicography*, by A.P. Cowie, *American Libraries Magazine* 40, no. 5 (May 2009): 56.
  4. How I obtained this description and picture of the library is not obvious. The date (Aug. 19, 2019) immediately under the picture of the monastery does not indicate how that date relates to the monastery. Is this the date the picture was taken? Editor's note: I found two articles about Saint Catherine Monastery: Daniel Esparza, "The Oldest Continuously Operating Library in the World is this Egyptian Monastery," *Aleteia* (blog), July 23, [no year], <https://aleteia.org/2019/08/19/the-oldest-continuously-operating-library-in-the-world-is-in-an-egyptian-monastery> (accessed July 23, 2020); Dattatreya Mandal, "Beyond the World's Oldest Continuously Operating Library—Saint Catherine's Monastery in Sinai," *Realm of History* (blog) July 2, 2016, [www.realmofhistory.com/2016/07/02/world-oldest-library-saint-catherines-monastery](http://www.realmofhistory.com/2016/07/02/world-oldest-library-saint-catherines-monastery) (accessed July 23, 2020).
  5. Jennifer Schuessler. "Rare Shakespeare Folio Found in French Library," *Toronto Star* (Nov. 27, 2014), 42. See also Jennifer Schuessler, "Shakespeare Folio Discovered in France," *New York Times* (Nov. 25, 2014), [www.nytimes.com/2014/11/26/arts/shakespeare-folio-discovered-in-france.html](http://www.nytimes.com/2014/11/26/arts/shakespeare-folio-discovered-in-france.html) (accessed July 23, 2020).
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  7. David Sax, "How Digital Archives Delete the Human Experience," *The Walrus* 15, no. 5 (June 2018): 80; see <https://thewalrus.ca/how-digital-archives-delete-the-human-experience> for a version updated March 27, 2020.
  8. Alberto Manguel, "Reinventing the Library," *New York Times* (Oct. 23, 2015), [www.nytimes.com/2015/10/24/opinion/reinventing-the-library.html](http://www.nytimes.com/2015/10/24/opinion/reinventing-the-library.html) (accessed July 23, 2020).
  9. David Sax, "Conserve and Protect," *The Walrus* 15, no. 5 (June 1, 2018): 79-81, [www.pressreader.com/canada/the-walrus/20180601/281556586450464](http://www.pressreader.com/canada/the-walrus/20180601/281556586450464) (accessed July 23, 2020).
  10. Manguel, "Reinventing the Library."

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*Jean Weihs, C.M., is a retired library science professor and author of numerous books. She represented the Canadian Committee on Cataloguing on the Joint Steering Committee for Revision of AACR for nine years, five of these as JSC Chair. She can be reached at [jean.weihs@gmail.com](mailto:jean.weihs@gmail.com).*

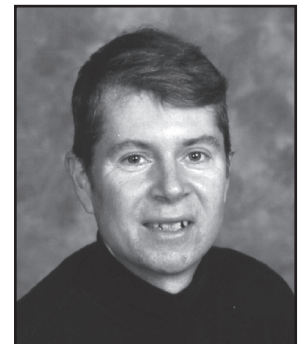
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# Making and Managing Metadata...➤

## Streaming Media Cataloging Delivery Optimization

By Tom Adamich



Tom Adamich

Over the last two decades, the development and success of video streaming (either in real time or archived content) has motivated libraries to assess the effectiveness of efforts to catalog content and provide access to metadata, either via the traditional library catalog or through discovery layer search. In this column, I will explore the preliminary results of a recent

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# Making and Managing Metadata.....

## Streaming Media Cataloging Delivery Optimization

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 survey conducted by members of Online Audiovisual Catalogers (OLAC) that focuses on how streaming video cataloging and metadata management influences optimal distribution and management outcomes for streaming video.<sup>1</sup> I also will identify some important streaming video cataloging and metadata concepts in the context of content acquisition, delivery, and collection management and examine the current streaming video delivery landscape and identify any trends or issues.

### What Is the OLAC Streaming Video Acquisitions and Cataloging Survey?

Three technical services librarians have worked since August 2018 to develop, administer, and analyze the OLAC Streaming Video Acquisitions and Cataloging Survey. Michelle Urberg, Metadata Librarian at ProQuest/ExLibris/Serial Solutions; Morag Stewart, Acquisitions Librarian for the University of Washington Libraries; and Kelley McGrath, Metadata Management Librarian at the University of Oregon collaborated with the primary goal of identifying what pieces of information make streaming media more accessible. The OLAC Streaming Video Acquisitions and Cataloging Survey team also hope to develop and distribute the following survey deliverables, according to their process document:

- A data set surveying the landscape of streaming video acquisition, cataloging, and discovery in libraries, with particular attention to the role of metadata in that ecosystem

- A set of best practices, intended to be a toolkit for libraries to use when communicating with streaming video vendors about metadata

Additionally, the OLAC Streaming Video Acquisitions and Cataloging Survey team identified several key populations that would benefit from the survey outcomes:

- Video content providers (vendors)
- Libraries that provide streaming video for their users
- Librarians who manage video content and metadata
- End users (library patrons)

The 11-page survey provides a comprehensive overview of streaming media cataloging and metadata processes, focusing on these topics:

- Demographics and scope of streaming video collection
- Individual title cataloging
- General cataloging questions
- Provider neutral records
- Cataloging and discovery tools
- Controlled vocabulary

The survey was distributed through a wide variety of electronic discussion lists, Facebook, and LinkedIn. The survey team used the Carnegie Classification types to sort responses from associate colleges, baccalaureate colleges, universities, and institutions granting master's degrees. Responses also were received from public, special, and federal libraries. Preliminary data cleaning indicates that 59 libraries completed the survey. Findings listed below are drawn from the preliminary data.

Questions associated with the OLAC Streaming Video Acquisitions and Cataloging Survey range from the

general to the specific. For example, the question, "What method(s) does your library use to add records for individual streaming video titles?" reflects a general, albeit detailed overview of streaming video acquisitions, included possible responses such as:

- Single title purchases (in perpetuity or life of file license)
- Single titles with a term license (e.g., 1-3 years)
- Individual titles that are part of a collection purchase (in perpetuity or life of file license)
- Individual titles that are part of a collection subscription
- Unpurchased individual titles that are part of a patron-driven (PDA) or demand-driven (DDA) acquisition collection
- Individual titles that have been purchased or licensed from an unmediated patron-driven (PDA) or demand-driven acquisition (PDA) collection after use
- Individual titles that have been purchased or licensed from a mediated patron-driven (PDA) or demand-driven acquisition (PDA) collection after user request
- Individual titles available through an EBA (evidence-based acquisition) plan
- Locally-reproduced content (e.g., a streaming video ripped from a DVD)
- Locally-produced content
- Other (please describe) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

For this question, participants also could choose to indicate they do not add individual streaming video title records for either some or all of their titles to a catalog or discovery layer.



Other questions were designed to obtain specific feedback on current streaming video cataloging processes as they relate to MARC record production. An example of this type of question is, “What information from a MARC record is used in your public catalog or discovery layer to identify records that are describing moving image content (film, television, video), including streaming video? This includes fields that generate icons and labels on results lists, as well as fields that appear in the full display.” Possible responses look at MARC record specifics, including:

- Leader/06 record type (g = projected medium) + 008/33 (type of visual material = v or m)
- 006 (fixed fields for additional material characteristics--used to describe additional record types other than the one present in the leader)
- 007 (physical description fixed field) for video recordings
- 245\$h (GMD or general material designation)
- 300\$a (extent, e.g., “1 online resource (1 video file (55 min.))”)
- 336/337/338 (RDA’s content, media and carrier types)
- Other \_\_\_\_\_
- I’m not sure

Questions about the use of controlled vocabulary (or uncontrolled vocabulary use) are explored in the following questions:

- What types of name headings (1xx/7xx/8xx) are used in your public catalog or discovery layer?
- LC NAF (Name Authority File)
- Uncontrolled names formatted in style of LC NAF

- Uncontrolled names not formatted in style of LC NAF (e.g., direct order: 700 \$a John Smith)
- Names in non-Roman scripts from parallel 880 fields
- Other

What types of topical subject headings (6xx, but not 655) are used in your public catalog or discovery layer?

- LCSH (Library of Congress Subject Headings)
- FAST (Faceted Application of Subject Terminology)
- MeSH (Medical Subject Headings)
- LC Children’s Subject Headings
- 650 2nd indicator 4
- Local in 690
- Other

What types of genre-form headings (655) are used in your public catalog or discovery layer?

- LCGFT (Library of Congress Genre/Form Terms)
- FAST (Faceted Application of Subject Terminology)
- GSAFD (Guidelines on Subject Access to Individual Works of

- Fiction, Drama, Etc.)
- MeSH (Medical Subject Headings)
- Other

Additionally, open-ended questions requesting comments on name, subject, and genre thesauri and authority sources were requested. This provided the participants the opportunity to share individual thoughts on how tagging and other user-generated descriptive vocabulary (e.g., crowdsourcing-based architecture, if used) are requested from vendor metadata and/or possibly incorporated into current streaming video cataloging workflows.

### Preliminary Findings

Michelle Urberg provided preliminary results from the survey.<sup>2</sup> Figure 1 highlights the key findings in the OLAC Streaming Video Acquisitions and Cataloging Survey results. Alternative MARC record fields and data, name authority files, and subject authority thesauri were used at varying levels, although there appears to be no pattern or preference. An example is the use of Medical Subject Headings

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Figure 1. Key Survey Findings

Survey Topic	Number of Responding Libraries
Content provider-supplied MARC records to promote access/discovery	(40 of 59)
Copy cataloging (OCLC, Skyriver)	(39 of 59)
Key MARC Record Streaming Video Identifier - Leader/06 record type (g = projected medium)	(32 of 59)
Key MARC Record Streaming Video Identifier - 008/33 (type of visual material = v or m)	(32 of 59)
Key MARC Record Streaming Video Identifier - 007 Physical Description Fixed Field (Videorecording)	(27 of 59)
Most popular name authority heading source (MARC 1xx/7xx/8xx) – LC Name Authority File (NAF)	(43 of 59)
Most used subject authority thesaurus (MARC 6xx) – LC Subject Headings (LCSH)	(46 of 59)
Most used genre form thesaurus (MARC 655) – LC Genre Form Terms (LCGFT)	(41 of 59)

# Making and Managing Metadata..... Streaming Media Cataloging Delivery Optimization

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(MeSH) by 24 of 59 libraries. This may be the result of general cataloging practices for the institution rather than the video recording material format itself.

Another interesting finding is that ten respondents were not sure about what pieces of the MARC record identify the material as moving image content, suggesting a possible, future opportunity to increase awareness among technical services librarians and the library technical services community on how to identify what information is central to identifying type of content in their catalogs and discovery layer.

## Why Is the OLAC Streaming Video Acquisitions and Cataloging Survey Significant?

After reviewing documents and feedback associated with the OLAC Streaming Video Acquisitions and Cataloging Survey (as well as participating in the survey), I have developed a great appreciation for what the OLAC Streaming Video Acquisitions and Cataloging Survey has accomplished. Being able to identify and analyze the key cataloging and metadata details that describe and make streaming video discoverable is a daunting task in itself. Add in the fact that the OLAC Streaming Video Acquisitions and Cataloging Survey team also included questions and details important to streaming video acquisition and management in today's libraries gives one a truly comprehensive overview of what libraries need to know about acquiring, delivering, and managing streaming video now and in the future.

The OLAC Streaming Video Acquisitions and Cataloging Survey fills a longstanding void, in my view, by serving as an important guide for reviewing streaming video acquisition, cataloging, and content delivery processes and performance. As a result of the questions asked and the thought processes behind question development, these concepts surfaced as streaming video issues that rely on accurate and properly-used cataloging and metadata to function at peak levels. Thus, they might be good candidates for review:

- Licenses expiring and losing access to content that remains in the catalog or discovery layer
- Inadequate license information from content provider
- Inadequate metadata for effective end user discovery (metadata is incomplete, inaccurate, or incorrectly formatted)
- Inadequate metadata for efficient record loading (metadata is incomplete, inaccurate, or incorrectly formatted)
- Specific field data inadequacies in vendor catalog records
- Problems with proxy service for off-site access
- URL issues with URLs sent from vendors
- Lack of staff to handle streaming content
- Lack of content desired by users

Furthermore, the OLAC Streaming Video Acquisitions and Cataloging Survey provides a platform for future streaming video advocacy from both the vendor and provider perspectives as well as the consumer and patron perspectives, because it helps to answer questions about what information

metadata are flowing through the information discovery network. These data range from descriptive content to structural delivery to administrative details. As Urberg mentioned during a recent conversation:

We definitely want to get the word out. The more [streaming video cataloging and metadata best practices] buy-in we have, the more likely librarians can exert influence over media providers. And, also, I have a feeling that media providers are likely interested in improving their metadata, but they don't always know how to translate what they already produce into usable material for libraries.<sup>3</sup>

Urberg reports that the final report will be kept on the OLAC website.<sup>4</sup> The survey team also will report their findings at the OLAC October 2020 meeting and hope to publish their work relatively soon. As more of the findings from the OLAC Streaming Video Acquisitions and Cataloging Survey become available and the final report is produced and available, the significance of the work Urberg, Stewart, and McGrath have completed will become even more evident, and its contribution to an important part of content delivery for 21<sup>st</sup> century libraries will grow and benefit many.

## References and Note

1. Information about the survey, including the survey questions can be found in "OLAC Streaming Video Acquisitions and Cataloging Survey," [https://pages.uoregon.edu/kelley/survey/OLAC\\_streaming\\_video\\_acquisitions\\_and\\_cataloging\\_survey.pdf](https://pages.uoregon.edu/kelley/survey/OLAC_streaming_video_acquisitions_and_cataloging_survey.pdf) (accessed July 3, 2020).

# Book Review

2. Michelle Urberg, e-mail messages to the author, May 29, June 29, and July 2, 2020.
3. Ibid.
4. Ibid.

**Hughes-Hassell, Sandra. *Collection Management for Youth: Equity, Inclusion, and Learning*, 2<sup>nd</sup> ed. Chicago: ALA Editions, 2020. 184 pp.; illus., index. ISBN 978-0-8389-4750-0 (softcover) \$44.99, ISBN 978-0-8389-4752-4 (PDF), ISBN 978-0-8389-4753-1 (ePub), ISBN 978-0-8389-4754-8 (Kindle).**

*Collection Management for Youth: Equity, Inclusion, and Learning*, 2<sup>nd</sup> ed., is certainly a timely publication as our profession strives to address the troubling issues of equity, diversity, and inclusion in the environments in which we work. Hughes-Hassell explains that “The audience for this book is all library staff who serve children and teens” (xviii). The theoretical foundations (Part I) apply to all such staff, but much of the emphasis in subsequent chapters is on an instruction role for library staff, especially those in school libraries.

Hughes-Hassell is well-equipped to address this important topic. She is a professor in the School of Information and Library Science at the University of North Carolina at Chapel Hill, where her research focuses on social justice issues in youth library services. She is a past president of the Young Adult Library Services Association. With Jacqueline Mancall, she co-authored the first edition, *Collection Management for Youth: Responding to the Needs of Learners* (ALA, 2005). The second edition expands on and updates the content of the first, and is dedicated to Mancall’s memory.

The introduction makes several key points to which Hughes-Hassell returns through the book:

- “To move from diversity to equity and inclusion, library staff need

to change the way they think, operate, and collaborate in all areas, including collection development and management” (xv)

- “My focus is on how the library’s broad community can most effectively develop and manage collections that meet the changing needs of learners and that are inclusive and ensure equitable access” (xvi).
- “Collection managers must reimagine their role and become *learner-centered collection managers* [author’s italics] who act as change agents, leaders, learners, and resource guides” (xvi)

Hughes-Hassell introduced me to a new acronym—BIYOC, which stands for Black, Indigenous, and Youth of Color. Hughes-Hassell explains:

The umbrella term “People of Color” has been criticized for erasing the unique experiences that Black and Indigenous people in the United States have had historically and that still impact their present realities, namely, the ongoing legacy of slavery that continues to impact Black Americans and the legacy of Native colonization and genocide. Black Americans who have recently immigrated to the United States have a different relationship with our country’s racial history, and the term BIYOC acknowledges the diversity of experience within the Black community (xx).

The book is divided into three sections, following the introduction:

Part I: Theoretical Foundations

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Tom Adamich President, Visiting Librarian Service, and can be reached at [vls@tusco.net](mailto:vls@tusco.net).

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## Book Review.....➔

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Chapter 1: Why a Focus on Equity

Chapter 2: Changing Theories and Frameworks of Practice

Chapter 3: Models of Collection Development

Chapter 4: Collector Behaviors

Part II: Strategies for Learner-Centered Equitable Collection Management

Chapter 5: Policy as the Foundation for the Collection

Chapter 6: Selecting Resources That Support Learning

Chapter 7: Budgeting for Maximum Impact

Chapter 8: Collaboration and Collection Planning

Part III: Tools for Equity, Inclusion and Learning, which provides reproducible blank copies of the 13 tools introduced in Part II.

Each chapter is enriched with figures, tables, and notes, and ends with a conclusion summarizing the chapter. Sources cited are listed in the References section, following most chapters.

The theoretical foundations are explained in thoughtful detail in Part I, and subsequent chapters build on what is introduced here. Of particular importance is the lack of diversity in children's literature. I encourage librarians to view the infographic, "Diversity in Children's Books," created by David Huyck and Sarah Park Dahlen (19). The infographic is available at <https://readingspark.wordpress.com/2019/06/19/picture-this-diversity-in-childrens-books-2018-infographic>. Hughes-Hassell introduces a model called Equitable Access Environment, which centers on the concepts of equity and learning, and is necessary to

develop inclusive and equitable library collections.

The four chapters in Part II offer specific strategies for those developing collections for youth. Hughes-Hassell stresses the importance of policy in Chapter 5, noting that

Policy is the guiding element in creating an Equitable Access Environment. It provides guidance to the library staff, directs collection actions at all levels, and, just as importantly, informs the community of what to expect from the library collection and resource access services (51).

She describes the elements in and steps involved in developing policy, introduces tools to use when doing so, and provides completed illustrative samples.

Chapter 6, "Selecting Resources That Support Learning," addresses desired learning outcomes, collection evaluation and assessment using qualitative and quantitative methods, selection criteria, and selection tools. Of particular value is Table 6.5, which offers selection tools for identifying diverse books. The one caveat I would add is that the URLs for all tools listed may not be persistent.

Chapter 7 presents the budget as "the framework for an action plan—the goal of which is to maximize the collection's impact on learning and ensuring equitable access" (131).

As noted above, Part III provides templates that collections librarians can use when implementing the strategies presented in Part II.

Hughes-Hassell writes clearly and persuasively. I recommend this book not only to those who work with children and teens, but to all who work in libraries. Far too many library

practitioners remain unaware of the biases that are present in our library collections and services. *Collection Management for Youth: Equity, Inclusion, and Learning*, 2<sup>nd</sup> ed., would also be an excellent textbook in graduate library and information science programs—and in teacher education programs, as well.

*Peggy Johnson*, Technicalities editor and author of *Fundamentals of Collection Development and Management*, now in its fourth edition.

# News From the Field.....➔

## Of Professional Interest

■ The **American Library Association** (ALA) has launched a curated, online repository of tools, guides, and resources to help libraries and their communities suffering from the COVID-19 pandemic. The **ALA COVID-19 Recovery website** ([www.ala.org/tools/covid-19-recovery](http://www.ala.org/tools/covid-19-recovery)) includes the latest information on safely reopening libraries, funding opportunities available on the local, state, and federal level, and more. It will be updated often and replaces the earlier COVID-19 Response page. The online resource center is arranged into four sections: Advocacy & Policy; Education; Data & Research; and Guidance Content & Protocol.

■ A new release was published to the **RDA Toolkit beta site**. The release introduces new features and functionality as well as some relocating of *RDA* content. Work continues toward the completion of the *RDA* Restructure and Redesign (3R) Project and the December 2020 switchover of the beta site. Both the beta site and the current version of the *RDA Toolkit* will be available to subscribers through 2021 and beyond. The goal is to allow institutions plenty of time to transition to the revised *RDA Toolkit* amidst the COVID-19 pandemic and other challenges.

■ The **Association of Research Libraries** signed the “**Position Statement on Controlled Digital Lending**” (<https://controlleddigitallending.org/statement>). Libraries use controlled digital lending (CDL) to circulate temporary digital copies of print books they own in a one-to-one ratio of “loaned to owned,” removing the

print copy from circulation while the digital copy is in use. CDL is a practice rooted in the fair use right of the U.S. Copyright Act and recent judicial interpretations of that right. During the COVID-19 pandemic in particular, many academic and research libraries have relied on CDL to ensure academic and research continuity at a time when many physical collections have been inaccessible.

■ The **California Digital Library** (CDL), the **Center for Research Libraries** (CRL), and **HathiTrust** (HT), with the support of the **Rosemont Shared Print Alliance** and the **Partnership for Shared Book Collections**, announced plans to work together to define a new phase of shared print built on open and interconnected infrastructure. This new phase seeks to bring the regional work accomplished to date into a strategic national effort. Working together in a coordinated fashion, the collaborators aim to assemble, preserve, and make accessible a more expansive and diverse shared collection for the scholarly community. CDL, CRL, and HT have outlined a mission, vision, principles, and assumptions to ensure that their work reflects the values and needs of the broader community. These documents are available at <https://cdlib.org/wp-content/uploads/2020/07/Principles-Vision-Mission-and-Assumptions.pdf>. During the second half of 2020, the three organizations are working with the community to explore possible “quick wins” (short term projects that contribute to the larger vision), sharing a complete communication plan, and establishing a website where one can learn about the work and ways to get involved.

■ The **Andrew W. Mellon Foundation** has revised its mission statement to focus more explicitly on social justice in all of its grant making. The new statement is: The Andrew W. Mellon Foundation believes that the arts and humanities are where we express our complex humanity, and we believe that everyone deserves the beauty, transcendence, and freedom to be found there. Through our grants, we seek to build just communities enriched by meaning and empowered by critical thinking, where ideas and imagination can thrive. Among other changes, the Scholarly Communications program area has been renamed “Public Knowledge,” which “supports the creation and preservation of our cultural record—the vast and ever-growing historical archive that helps us explore and better understand our intertwined humanity. Our goal is to increase equitable access to deep knowledge—from scholarly texts to community collections—that helps build an informed, culturally diverse, and civically engaged society.” See <https://mellon.org/news-blog/articles/mellon-foundation-announces-transformation-its-strategic-direction-and-new-focus-social-justice>.

■ The **Association of Research Libraries** (ARL) Advocacy and Public Policy Committee and the **Canadian Association of Research Libraries** (CARL) Policy Committee announced the launch of a joint ARL-CARL **Task Force on Marrakesh Treaty Implementation**. The task force is charged with identifying and recommending the resources needed to implement the terms of the Marrakesh Treaty to Facilitate Access to Published Works for Persons Who Are Blind,

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## News From the Field.....

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Visually Impaired or Otherwise Print Disabled ([www.wipo.int/treaties/en/ip/marrakesh](http://www.wipo.int/treaties/en/ip/marrakesh)).

■ **The National Information Standards Organization (NISO)** announced that a revised version of its recommended practice, *RP-19-2020, Open Discovery Initiative: Promoting Transparency in Discovery* (<https://www.niso.org/publications/rp-19-2020-od>) is available for use by the information community.

■ **Jisc** has published *Purchasing Digital Archives: Guidelines for Libraries When Negotiating with Publishers*, by Karen Colbron and Peter Findlay ([www.jisc.ac.uk/guides/purchasing-digital-archives](http://www.jisc.ac.uk/guides/purchasing-digital-archives)). The guide aims to support libraries in negotiating with publishers by describing best practices that will balance the business needs of publishers with the requirements of libraries, and creating a mutually-beneficial relationship. The goal is to work towards a business relationship whereby one-off purchases are truly one-off investments on the part of libraries, or at least one in which ongoing fees are routinely transparent, predictable, and affordable/manageable.

■ **Reopening Archives, Libraries, and Museums (REALM; [www.webjunction.org/explore-topics/COVID-19-research-project.html](http://www.webjunction.org/explore-topics/COVID-19-research-project.html))**, a project generating scientific information to support the handling of core museum, library, and archival materials as institutions begin to resume operations and reopen to the public, has been **testing the presence of the COVID-19 virus on library materials**. In the first phase of the research, scientists at Battelle tested the COVID-19 virus

on a variety of surfaces in environments with standard temperature and relative humidity conditions typically found in air-conditioned office space. Materials tested in phase one included the cover of hardcover books (buckram cloth), the cover of softback books, plain paper pages inside a closed book, mylar protective book cover jackets, and plastic DVD cases. Battelle tests found the virus undetectable after one day on the covers of hardback and softback books as well as the DVD case. The virus was undetectable on the paper inside of a book and mylar book jackets after three days. The phase 1 report is available at [www.webjunction.org/content/dam/WebJunction/Documents/webJunction/realms/test1-report.pdf](http://www.webjunction.org/content/dam/WebJunction/Documents/webJunction/realms/test1-report.pdf). The results of the second round of Battelle's laboratory testing on five commonly handled materials (braille paper pages, glossy paper pages, magazine pages, children's board books, and archival folders) have also been released; see [www.webjunction.org/content/dam/WebJunction/Documents/webJunction/realms/test2-report.pdf](http://www.webjunction.org/content/dam/WebJunction/Documents/webJunction/realms/test2-report.pdf).

■ In addition, the **REALM Project** has released a collection of **reopening plans from public libraries** that can be helpful references as libraries, archives, and museums prepare to resume operations. The first collection of examples is organized under topics commonly addressed in reopening plans, such as staff and patron considerations, facilities and space adaptations, and materials handling protocols and procedures. While the documents reflect specific, local guidelines, they provide important considerations for organizations in other locations. This section on reopening plans will be updated and expanded to include other institutional types as the REALM Project

progresses. See [www.webjunction.org/news/webjunction/preparing-to-reopen.html](http://www.webjunction.org/news/webjunction/preparing-to-reopen.html).

■ **EBSCO Information Services (EBSCO)** has developed a new resource to make harvesting COUNTER reports easier. The **SUSHI Harvester for Multi-Site Libraries** (the R5 Harvester) is designed to help small to medium size consortia more easily gather COUNTER reports for their affiliated libraries. The R5 Harvester, which is free for non-commercial use, and the supporting manual are available at the COUNTER website: [www.projectcounter.org/r5\\_harvester](http://www.projectcounter.org/r5_harvester).

### Publishers and Vendors

■ **JSTOR** (a part of ITHAKA) is establishing a \$4 million relief initiative to mitigate the unprecedented financial impact of COVID-19 on JSTOR-participating libraries. This relief will be distributed as follows:

- All participating institutions will receive a fee offset to one year of JSTOR and Artstor annual access fees, ranging from 3.5% to 5%.
- This fee offset will be issued as a one-time credit to participants, but can be applied when needed any time from 2021 to 2023.
- It can be used for JSTOR or Artstor renewals beginning January 1, 2021, or put towards licensing additional resources, including Books at JSTOR, if a reduction in annual fees is not preferred.
- Participating institutions will receive information about their fee offset and can contact JSTOR with any questions.

■ **JSTOR** also announced no fee increase for JSTOR Archive

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 Collections and Artstor Digital Library through 2023. In announcing these steps, Kevin Guthrie, president of ITHAKA, explained,

We take our role as a not-for-profit organization with a mission to expand access to scholarship very seriously. We are stewards of the resources you contribute to support our efforts. Covering the costs of these initiatives will require us to run an operating deficit this year, but we are also taking steps to reduce expenses. We have cut spending throughout the organization, decreased inefficiencies, and imposed limits on hiring. We are also considering many of the steps libraries and publishers have had to take, including salary freezes and reductions to retirement contributions for employees. These are not easy decisions, but we are all part of one community facing these challenges. Moments like these demand creativity and sacrifice from us all, and we continue to be inspired by how our community has rallied to meet the challenges of the day.

See <https://about.jstor.org/news/jstor-offers-4-million-fee-relief-for-libraries-and-guarantees-revenue-for-publishers-holds-pricing-flat-through-2023> for the full announcement.

■ Eleven publishers (**Royal Society of Chemistry, American Chemical Society (ACS), BMJ, Cambridge University Press, the Company of Biologists, Emerald Publishing, Elsevier, Hindawi, IOP Publishing, Oxford University Press, and Royal Society Publishing**) have signed an agreement ([www.rsc.org/new-perspectives/talent/joint-commitment-for-action-inclusion-](http://www.rsc.org/new-perspectives/talent/joint-commitment-for-action-inclusion)

and-diversity-in-publishing) to take a proactive stance against bias and commit to working together to better reflect the diversity and to remove barriers for under-represented groups. They agreed to:

- Understand our research community
- Reflect the diversity of our community
- Share success to achieve impact
- Set minimum standards on which to build.

■ A number of libraries and consortia have entered into **transformative agreements with publishers**. Following are a few representative examples:

- **Taylor & Francis Group and The Ohio State University Libraries** have entered into a new read and publish agreement. Beginning in July 2020, the three-year agreement gives the Ohio State community on-going access to Taylor & Francis’s collection of more than 2,300 journals. It also covers the open access publishing costs of articles published by Ohio State authors in Taylor & Francis journals. Styled as a pilot, the details of the agreement are not publically disclosed.
- **Springer Nature and the University of California (UC)** have agreed to a Memorandum of Understanding for a transformative agreement (TA). The three-year agreement will accelerate Open Access research in the U.S. and make U.S.-funded research more visible, usable, reusable and reproducible around the world more quickly. It will enable all UC researchers to publish OA in Springer Nature’s portfolio of over 2,200 hybrid journals as well as

in over 500 Springer Nature fully OA journals, including those in the BMC portfolio. It also provides reading access to all journals in the Springer portfolio.

- **Oxford University Press and National Science Library, Chinese Academy of Sciences** agreed to the first Read and Publish deal in China.
- **American Chemical Society** partnered with **University of Campinas** in the first open access agreement in Latin America.
- The **University of Florida** and **Elsevier** signed a pilot agreement to support open access publishing and research.
- **FinELib**, the Finnish library consortium, and **Taylor & Francis Group** have announced a new “read & publish” agreement, which runs until the end of 2022. Along with continued access to Taylor & Francis and Routledge journals, researchers based at one of the 15 participating Finnish institutions are now able to publish their articles open access in more than 2,000 Taylor & Francis Open Select (hybrid) journals without needing to pay an article publishing charge. In conjunction with this transformative agreement it has been announced that *Annals of Medicine*, an international journal founded in Finland, also will become fully Open Access. *Annals of Medicine* will continue to be included in this FinELib agreement after its conversion.

■ Several publishers are holding **subscription prices unchanged for 2021**. Again, the following are examples and do not represent all publishers that are doing so.

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## News From the Field .....

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- In recognition of the financial challenges that many libraries now face as a result of COVID-19, **Duke University Press** will to keep 2020 prices for the 2021 calendar year for journals and electronic collection products (with the exception of subject collections, where the pricing is based on the number of included titles). Pricing will remain unchanged for direct journal subscriptions, the e-Duke Books and e-Duke Journals collections, *DMJ 100*, MSP on Euclid, and Euclid Prime. Detailed information is accessible at [dukeupress.edu/libraries](http://dukeupress.edu/libraries).

- **Project MUSE** announced it will keep pricing for all Project MUSE Journal Collections flat for the 2021 calendar year due to COVID-19.

Libraries should contact the publishers and vendors with whom they work to see what options are available. EBSCO is maintaining a freely accessible list of "Publisher Pricing Updates for 2021 Subscriptions" (<https://more.ebsco.com/rs/689-LNQ-855/images/COVID-19-Publisher-Pricing.xlsx>). Note that this list provides increases that range from 0 to 12 percent (for Population Investigation Comm.).