

# Technicalities™

Information Forum for the Technical Services Professional

## Reality Check.....→

### Recalling the Library of Congress's Bicentennial ... 20 Years Later

By Carlen Ruschoff



Carlen Ruschoff

Twenty years ago, the Library of Congress (LC) celebrated its bicentennial anniversary. To commemorate this event, LC sponsored the "Bicentennial Conference on Bibliographic Control for the New Millennium: Confronting the Challenges of Networked Resources and the Web."<sup>1</sup> The challenge of managing web and digital resources

was the foremost issue for libraries at the time. In the 1990s through the beginning of the 21<sup>st</sup> century, libraries were acquiring digital content as rapidly as possible. Web content was exploding and not at all controlled by libraries. Serials were increasingly being made available in digital formats. Making matters more complicated, many information resources were being published outside of the traditional commercial publishing framework. Library leaders and other stakeholders were faced with the challenge of managing all that content, ensuring that it was fully described, and made discoverable.

The bicentennial conference was held in November 2000. LC invited experts from communities that were

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## Dollars and Sense.....→

### Hernando's Hideaway

By Sheila S. Intner



Sheila S. Intner

Back in the 1950s, "Hernando's Hideaway" was the name of a popular song in the score of a Broadway musical titled *The Pajama Game*. On one of our first dates at that time, my husband-to-be took me to see it. The song described a dimly lit Spanish-language nightclub where couples could discover love as they danced and drank the night away. At this point, you might well ask, "What on earth has this got to do with technical services?" I promise you will soon see the connection.

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**Volume 39 No. 6**

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

**Library Politics**

By Peggy Johnson



Peggy Johnson

When you hear “office politics,” what comes to mind? Many people say simply, “I try to avoid it.” Others might say, “It’s the dark side,” and inevitably destructive. In a survey reported by Robert Half, 46 percent of respondents reported that the most common form of office or workplace politics is gossip; 28 percent said the most common form is gaining favor by flattering the boss.<sup>1</sup> Both have negative connotations. Storm, Kelly, and DeVries observe that,

Library workplace environments have zones of tension and dynamics just like any corporation, often leading to the formation of political camps. These different cliques influence productivity and work-related issues and, at worst, give meetings the feel of the Camp David negotiations.<sup>2</sup>

A more positive approach is to consider office politics as *workplace diplomacy* and an essential part of managing organizational dynamics—that is, working with people to get things done. People and organizations are naturally political. If one fails to pay attention to what is happening in the organization, he or she is at a disadvantage when trying to get things done. According to James,

Office politics crosses all cultures, and respects no boundaries. It seeps into organizations of all

shapes and sizes. Neither gender can claim greater prowess, or ignorance of office politics. It gets under everyone’s skin. You can’t escape it. But you can (and should) learn to play the game.<sup>3</sup>

The point that James and many others make is that appropriate office politics build effective relationships, which are essential in all organizations. Workplace politics, when managed effectively, can build coalitions that foster compromise, cooperation, and (ideally) collaboration. Ahearn and colleagues define political skill as “the ability to effectively understand others at work, and to use such knowledge to influence others to act in ways that enhance one’s personal and/or organizational objects.”<sup>4</sup> In the words of Eiring, “Politics is the art of negotiation, compromise, and satisfaction.”<sup>5</sup>

**On Being Politically Astute**

Several authorities give advice on attributes common to politically skilled individuals. Ferris and colleagues identify four dimensions

of political skill: social astuteness, interpersonal influence, networking ability, and sincerity.<sup>6</sup>

*Social astuteness.* Individuals possessing political skill are astute observers of others. They are attentive and empathetic. They understand social interactions well and accurately interpret their behavior and the behavior of others. They are keenly attuned to diverse social settings, have high self-awareness, and are sensitive to others.

*Interpersonal influence.* Politically skilled individuals have an unassuming and convincing personal style that exerts a powerful influence on others around them. Interpersonal influence allows people to adapt and calibrate their behavior to different situations to elicit the desired responses from others. They demonstrate flexibility, which involves adapting one's behavior to different targets of influence in different settings to achieve one's goals.

*Networking ability.* Individuals with political skill are adept at identifying and developing diverse contacts and networks of people. People in these networks tend to hold assets seen as valuable and necessary for successful organizational and personal gains. Because of their typically subtle style, politically skilled individuals easily develop friendships and build strong, beneficial alliances and coalitions. Individuals with advanced networking ability ensure they are well positioned to both create and take advantage of opportunities. People with this attribute are often highly skilled negotiators and deal makers, and adept at conflict management.

*Sincerity.* Politically skilled individuals have high levels of integrity, authenticity, sincerity, and genuineness. They are honest, forthright, agreeable, positive, and often serve as role models. This dimension of political skill is crucial if attempts to influence outcomes are going to be successful because it focuses on the perceived intentions of the behavior exhibited without ulterior motives. Individuals high in sincerity inspire trust and confidence in and from those around them because their actions are not interpreted as manipulative or coercive.

Robert Half offers guidelines for effective office politics.<sup>7</sup>

- Build a broad coalition of support and involve all colleagues at all levels.
- Avoid smear campaigns, gossiping, and mudslinging. Stay true to your values.
- Play by the rules and avoid sticky situations; in other words, know and be sensitive to your office culture.
- Avoid controversy and heated debates about non-work issues.
- Be sociable and get to know the people at all levels where you work.
- Be honest and forthright—if you make a mistake, admit it immediately and apologize. To do so enhances credibility.

### Conclusion

Office politics are a reality, even in libraries. Engaging in office politics should not be perceived as joining

forces with the dark side. Navigating office politics skillfully improves one's ability to succeed both in the organization and personally. Developing and maintaining trust, and gaining and retaining respect should be goals. Building effective alliances is at the heart of workplace politics. And a lot of it comes back to being nice—treat others as you wish to be treated.

**Epilogue:** In the Nov./Dec. 2018 issue, I wrote about the St. Paul Public Library's plan to eliminate library late fines and subsequently reported that St. Paul City Council approved a budget that increased the library's budget to offset the loss of fine income.<sup>8</sup> The results of this policy change suggest that it has been extremely beneficial. Data tells the story.

More than 65,000 items have been checked so far in 2019 by people with cards that were previously blocked.

Circulation the second quarter of 2019 increased in all locations, especially in branch libraries that serve lower income areas. For example, one of these branches saw an increase of 19.3 percent.

New library card registration increased 8.2 percent, reversing a past steady downward trend.<sup>9</sup>

Other libraries are doing likewise. On September 30, the Chicago Public Library, the largest municipality in the United States, announced it would stop fining people for overdue books and wipe away patrons' outstanding debt.<sup>10</sup> I find these changes extremely exciting.

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

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### Editor's note about new contributor:

I am delighted to welcome a new contributor to *Technicalities*—Kevin Merriman, Director for Collection Management, Access Services, Technical Services, and Technology, Center for Science and Social Science Information, Yale University Library. He will be writing about collection management and development issues under the provocative column title, "Naïve Questions and Tenuous Connections."

## Reality Check.....

### Recalling the Library of Congress's Bicentennial ... 20 Years Later

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involved in the creation, cataloging, and discovery of digital resources to explore obstacles in managing the digital environment. The primary ambitions of the conference were: "1) to develop an overall strategy to address the challenges of improved access to Web resources through library catalogs and applications of metadata . . . and 2) to identify attainable actions for achieving the overall strategy." The intent of this working meeting was to generate ideas and recommendations that would inspire innovative strategies to improve bibliographic control of the digital resources.

In their discussions, the conference participants acknowledged that there was more information to be cataloged for discovery than traditional library technical services could manage. There was also a recognition that new communities with their own interest in managing digital resources had emerged. In addition, there was new technology that could and should be leveraged to capture and distribute metadata. The consensus was that libraries and other stakeholders should work together to reposition the bibliographic control and discovery field to connect with interrelated communities and to harness available technologies to maximize user access to these information resources. Collaboration and partnerships across communities was a major theme that

emerged from the meeting.

The outcome of the conference discussions was a document called *Bibliographic Control of Web Resources: A Library of Congress Action Plan*.<sup>3</sup> The plan contained six items for the purpose of reconsidering bibliographic control for a digital world. These action items were:

- 1) increased availability of standard records for Web resources;
- 2) enhanced record display and access across multiple systems;
- 3) collaboration among metadata standards communities for better bibliographic control of Web resources;
- 4) development of automated tools for harvesting and maintaining metadata;
- 5) provision of appropriate training for the Web environment; and
- 6) support of research and development to enhance bibliographic control of Web resources.

The goals were very broadly stated and designed to spur thinking on how current models and new methods could be designed to create a more effective and sustainable ecosystem. And, each action item acknowledges the importance of partnerships and a diffuse range of other communities, including: metadata producers; standards developers; systems and software vendors; computing and technology suppliers; scholarly and academic enclaves; publishers; dot.com creators; bibliographic utilities; registration agencies; other information providers; government agencies; other libraries, including national libraries; and other stewards of cultural and historical knowledge, e.g., museums and archives.<sup>4</sup>

### What Happened Next?

Many initiatives were launched

following the bicentennial conference. Some of these had near-term results, others were long-term, and many evolved and became imbedded in the ongoing work of stakeholders. Near term efforts included building an education program to foster cataloging skills for digital resources. Curricula in training library professionals and library school students were developed and implemented. Collaboration between LC, OCLC, and the Deutsche Bibliothek to expand the name authority file was pursued. This project led to the development of the Virtual International Authority File project (VIAF). Publishers, vendors, and library service providers collaborating with libraries began to explore and develop mechanisms for distributing metadata that could be used to reuse and repurpose metadata. These efforts led to the refinement of record distribution services for digital content and improved standards for linking resolvers to support discovery between systems.

Just as important as these near-term initiatives were the research undertakings that provided guidance for moving forward in new and creative directions. For example, ways to provide more granular subject access to resources through tools such as front-end thesauri were investigated. Exploration of library principles for data content and structure were created for the metadata community to be used as guidance in building new metadata schema. Karen Calhoun's ground-breaking paper, *The Changing Nature of the Catalog and its Integration with Other Discovery Tools*, examined the role of the library catalog in a world of growing discovery tools, described the changing ecosystem in the research discovery area, and framed a picture of where the

research communities should direct their efforts.<sup>5</sup>

The bicentennial conference was a great success. The outcome of the meeting articulated the issues libraries and other metadata communities were facing in managing digital resources. Even better, the *Library of Congress Action Plan* provided a solid outline for creating a new environment better prepared to meet user discovery needs. The training efforts, standards development, and the research that followed the conference positioned library professionals to carry forward in developing new models and methods to support a sustainable ecosystem for managing digital resources. The framework was just what we needed to guide the amplification of our strategic plans and standards development—and it was effective!

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## Dollars and Sense..... Hernando's Hideaway

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In the late 1970s and 1980s, my primary specialization as a doctoral student was cataloging. My dissertation and first book, based on it, had to do with access to things other than books that we now call “resources.”<sup>1</sup> As you might suspect, many of my master’s and doctoral degree papers had to do with catalogs and cataloging, and sometimes began with a review of its history. I described catalogers and bibliographers from other centuries and foreign countries, but, until now, I did not know of (and, thus, never mentioned) one of them all: Hernando Colón, Christopher Columbus’s second son. Not until a short time ago, when I read the review of a book titled *The Catalogue of Shipwrecked Books: Christopher Columbus, His Son, and the Quest to Build the World’s Greatest Library*, by Edward Wilson-Lee, did I ever encounter Colón.<sup>2</sup>

According to the review, Colón gathered “fine volumes and ephemera, pamphlets and song sheets . . . books in languages he couldn’t read . . . [and] printed images. In order to manage his vast library, Hernando imported multilingual scholars from the Low Countries to serve as its librarians and developed an elaborate cataloging system to index the books’ contents.”<sup>3</sup> While my interest was piqued by this information because I am an ex-media cataloger, it was the kind of catalog Colón created that prompted me to write this column.

### Hernando's Catalog

Ms. Dumitrescu writes,

In an age of abundant and unreliable information, the person who can impose order can shape history—or at least command a comfortable

pension. [Colón’s] own tools were . . . hardly humble: lists of authors and works, book indexes, a hieroglyphic code used in an early version of the card catalog, keywords and content summaries that would allow readers to find the volume they needed. In short, ‘Hernando had created a search engine.’<sup>4</sup>

How many catalogers think of their work as building a search engine? And, although it is now no longer uncommon for catalog records to include content summaries, how many actually do? And, how many of us long-time cataloging specialists knew about Colón’s “search-engine-style-catalog” before this, though we certainly knew of a variety of early catalogs?

To find out more about the Colón catalog, I went to *Wikipedia*, which offered the following information:

Fernando personally noted each and every book that he or his associates acquired by listing the date of purchase, the location and how much was paid. Fernando had his associates prepare summaries of each book in his collection and devised a hieroglyphic blueprint of his library. In 2013, history professor Guy Lazure serendipitously stumbled upon the massive catalog, known as the *Libro de los Epítomes*, long thought lost and consisting of 973 leaves of paper, while conducting unrelated research.<sup>5</sup>

Alison Flood offers more details about the catalog. She writes: “The *Libro de los Epítomes* manuscript, which is more than a foot thick, contains more than 2,000 pages and summaries from the library of Hernando

Colón . . . who made it his life's work to create the biggest library the world had ever known in the early part of the 16th century.”<sup>6</sup> While we may quibble about whether to count leaves or pages, it is clear Colón's catalog was extensive, and the photograph of a leaf of the manuscript itself in the Flood article illustrates exactly how extensive the content summaries can be. In addition to that, Colón included acquisition information in these records, which was not done in modern libraries until the advent of computerized cataloging. Separate files containing acquisitions information was typical before computerization, but rarely, if ever, displayed in public catalogs. On the other hand, that information is essential to a collector, for whom the process of acquiring something is as important to revisit as the thing itself.

### Does It Matter?

Hernando Colón was far from the first collector to create a catalog. Library history tells us about much earlier ones—more than 2,600 years ago, a catalog of the Royal Library of Ashurbanipal at Nineveh was recorded on numerous clay tablets and 300 years later, Callimachus prepared a catalog of the Alexandrian Library. The desire to collect all knowledge continued to challenge some members of the educated population and the need to record what was in those collections followed more or less naturally.

Throughout the years, we know about catalogs of the holdings of monasteries, universities, and other institutions, some of which are well known today, such as the Bodleian Library. As for those of the United States, perhaps the most notable of these early catalogs is the one devised

by Thomas Jefferson that was the forerunner of today's Library of Congress catalog. We can only imagine what Jefferson might think about the changes made not just to his classification, which was superseded many decades ago, but to current ideas about what we should see in a catalog record.

### Conclusion

I am happy to learn about the Colón catalog, if for no other reason than to be better informed about the history of my specialty. It tells us we modern catalogers are not the first to record more summaries and longer ones than might fit on a 3 x 5 inch card for a few resources in the records we prepare, offering those who view them more information than mere citations augmented by author, title, and subject headings. Another reason it pleases me is that Colón's collection included things like images and pamphlets as well as manuscripts and printed books, and he cataloged all the things he gathered in multiple languages and scripts. And last but not least, I am glad knowing that his efforts have survived for 500 years in their original form. Since they have, perhaps we can all get to see and admire his catalog if and when it is digitized. In the meantime, for those who want to know more about it, a scholarly monograph about Hernando and his work by Mark P. McDonald is available via WorldCat and other online listings.<sup>7</sup>

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# Naïve Questions and Tenuous Connections.....

## Sense-making of Contemporary Academic Collections

By Kevin Merriman

### Across Time and Space

Some children are innately drawn to the land of words and ideas and the talismans of the mind. Many of us never leave. My tenure as a newspaper delivery boy initiated over three decades in information delivery services, and overlapped the very familiar career foreshadowing of working as a page in my high school library and public library. After college, I worked nearly a decade in bookstores. All realms of the written word are connected but time spent “backstage” in the overtly vulgar and commercial regions of the land of words and ideas changed my perspective about the iconification of the objects thereof. Rites of passage such as being instructed to tear the covers off of paperback books to get credit for unsold stock was unthinkable and abhorrent to me. My earlier experience of seeing library books being put on book trucks for readers to take for free seemed far more enlightened. Is it not better to give away a book than destroy it? Once an object with inherent value exists, to remove it from reality seemed evil and, yet, the universe operates in balance: despite finite resources, relocation was part of a natural order. To destroy a book was an unnatural act, a nearly-mythical literary trope of humanity having lost its way. But, what at first was shocking became routine

and over time stripping paperbacks became, in many ways, enjoyable. And, despite this industrial culling, the then unknown-to-me maxim of “every book his reader” still resonated as customers rooted through the mark-down bins for 99-cent treasures.

With no disrespect to Ranganathan, time-honed systems in libraries and bookstores acknowledge that not every bound literary vessel is equally esteemed. For many books, its reader is a null set. Ultimately, each merely manifests glimpses into the intangible infinite of all human experience. The technologies of writing, printing, and related audio-visual technologies to send human knowledge and information across time and space is transcendent but nonetheless a means to an end. That the objects of transmission have inherent value is a common misunderstanding that I held in my youth, but a library is not necessarily a museum or an archive.

My move from retail to academia was an effort to work where I believed connections would be motivated by mission and not profit. I wanted to be closer to people are searching for truth and meaning and I hoped that I could help facilitate their work because I was far too intimidated to consider “truth” myself. Now, nearly two decades later, I am compelled to search for a better understanding of truth. I reflect on the



Kevin Merriman

intersection of mission and profit as motivators to search because, despite all I have learned through my career, I find technologies are exponentially complicating the work needed to support humanity’s truth-seekers and fragmenting the associated skill sets. This series of articles under the title “Naïve Questions and Tenuous Connections” is an admission of ongoing ignorance and an invocation of collaborative sense-making.

### Where to Begin

Without legal details or deep economic analysis, this article explores my fear that the copyright privileges libraries are losing with the move from purchasing print to licensing electronic products is disrupting the role of the library in the value chain and that some vendors may be building a long game to edge out the library and its leverage of copyright for academic endeavors. The profit margins of academic publishers demonstrate the strength of their position in advancing their goals, whatever they are, and I am not sure we as customers fully understand them. If libraries suggest they can only afford to purchase what professors request, vendors understandably market to the

professors directly instead of librarians.

Many licenses aim to maximize revenue, not maximize exposure. Further, the market value of some data desired by academic researchers is determined in a different market than traditional academic resources.

Rather than familiar campus-wide access to information content as a raw resource to reinterpret creatively, some vendors are limiting the type of research done on a licensed product and segmenting the user population of the institution. They hope for an addendum with a supplementary charge attached. As a cost-saving measure, a library might accept a license to provide low-level campus-wide access with supplemental direct enhancement charges for specific research groups. Supplemental charges may be paid by the library or by the researcher's budget. Researchers also contract directly with vendors when the content does not merit campus-wide exposure. These models of tiered brokerage and fragmented licensing compromise advancement of research because of increasing segmentation of access to resources even at a single institution, but they are growing because of researcher demand.

### Containerizing Access to the Infinite

I have long joked that library-content-providing vendors will not be happy until our computer cameras follow our eyes and track a micro-payment for each letter or word read from content they own or re-license. This is broad, rude, incorrect, and possibly not even funny. Consider,

however, that the exaggeration sets the stage for a thought experiment.

Consider the mindset behind maximizing the marketable utilization of an intellectual asset such as a book, article, movie, or dataset. Consider the approach libraries take regarding access to information as a service and information itself as a marketable product—are our approaches different or similar to a vendor's model? Are libraries akin to the local books store chain in a world of Amazon? Content providers build an asset base with the intention of recouping the cost of content acquisition, overhead, and an often shockingly impressive margin of profit. Libraries also continue to build collections and develop access to collections for the allure of potential researchers, not for financial recompense for the investment, but to fulfill the mission of ensuring each reader is able to get to the yet-to-be known content. And, despite Pareto's Principle and limited resources, we do this partially because we believe the content is scarce and access to the content is somehow finite and limited so we snatch it up before other libraries deplete the supply or the vendor takes it off the market, which one might call, perceived (or real) "artificial scarcity."

"The Collection," a repository of some pieces of recorded human knowledge, is but a vehicle viewed as a monolith. It is mutable. I like to think of a library collection as a living entity with a life cycle much longer than my own and then I like to imagine it in a time lapse video. Often starting from a seed donated by a wealthy land

owner of yore or a clipping like a rare violet from another library, it ingests nutrients to grow, it generates waste, and, while growing, it sheds duplicate content and unneeded appendages while inadvertently clinging to vestigial organs. Collections that are large and old do not move quickly, but many try to remain current and follow trends with differing levels of success and grace.

Considering competitive advantage of an institution of education and learning, the library collection historically has been seen as an asset. Public and privately-owned information collectively is a full-continuum of recorded human knowledge but is still a discretely-packaged subset of all human knowledge across time and space. Despite physical media including text, images, and raw data, library collections still do not encompass intangible knowledge such as dance, song, speech, and other knowledge that lives or has lived in individuals who were unwilling or unable to externalize their experience in tangible form. The physical containers are the basis for collections as well as for copyright, licensing, and statistics while human knowledge itself is unbroken, uncontainable, and ever-growing. I now invoke the adage that knowledge is not wisdom.

Contemporarily, there is acknowledgement that beyond the owned and licensed collections, a library-provided value-added feature is the relationships that are built to extend collections and expedite services, i.e., the concepts of collaborative collection building,

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## Naïve Questions and Tenuous Connections..... Sense-making of Contemporary Academic Collections

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shared collections, and consortia. Prospective students and others hungry for knowledge may respond to that message because the numbers are staggering even to the most devoted hoarder of books: 2.8 billion holdings in OCLC's WorldCat, with an overwhelming percentage available to anyone connected to a library offering interlibrary loan.

Amazingly enough, even if we were to pretend that was close to all the information in all the world, there is a contrasting collection of significant size: privately-owned (and corporate-owned) recordings of human data and knowledge. The library is akin to the largest buffet—more than you could ever use, more than you will ever need, with a staggering array of exotic options. But, does it have what you want? Does it have what you need? Possibly, but possibly not. It exists as a gestalt, however, of “if you cannot find it here, (maybe) you do not need it.” But even collectively, all collections are not everything.

Gone are the days of telling users “if it does not appear in our records, it does not exist.” The world is our search-engine, our abstracts, and our indices. One never knows where a partial citation may originate. We librarians have never worked in a completely closed system, but the connections and referents have grown in the electronic age and the contemporary system of citation sources is everything and everybody. Interlibrary loan is still a special kind of magic, but it has its limitations and, despite the awesome power of reciprocal agreements for owned copies of content and pre-negotiated shipping rates, users continue to need

content that operates in a different dimension from library shelves and article databases.

### When a Library Is Not a Library

Content-providing vendors amass content, develop research services, and even hire degreed librarians to perform core functions related to librarianship, such as descriptive cataloging. And although they closely resemble (virtual) libraries, they are not libraries, they are partners—the refineries of content from which libraries source their products. They are friends and colleagues doing the work that can be centralized outside of an institution so that individual libraries are free to focus on services unique to their constituency and to customize offering from the larger supply chain of content and products.

However, I am inclined to consider some content-providing vendors hybrid libraries, such as those with a model of offering some services gratis and charging for others. After all, even some cash-strapped libraries will pass on the cost of interlibrary loan to the researcher. Vendor-provided library services are sometimes presented as a freemium model, such as searching their content and only receiving the metadata without actual content unless a charge is paid. Some vendors will give you the first article free. The system offers the researchers affiliated with a non-subscribing library and completely independent researchers the opportunity for manufacturer-direct access to information products. Is this not the democratic utopia we imagined the internet to provide?

Vendor-libraries market directly to users and leverage the existing

systems by suggestively encouraging users to “tell your institutional library that they need to purchase this for you.” I want to believe it is helpful when users clearly express what they want and need to a library collection manager, but this marketing technique reminds me of breakfast cereal companies advertising to children and drug companies telling consumers to “ask your doctor.” We in library-land have to respond to “ask your librarian if this data product is right for you.” The advertising asserts that the product can solve problems that have been plaguing researchers and problems they never knew they had. And, after the freebies, either the researcher or their institution will have to pay.

And, in fairness, we do pay. Negotiating access to content we do not own and paying for it is still a core function of academic libraries. Purchases and license agreements are markedly different than a reciprocal borrowing privileges agreement we might enter with like-minded library seeking mutual enhancement of access to complementary collections. When the library acquiesces to a researcher-initiated purchase, a library vendor may write into the library license that it cannot share the content with fellow libraries, a pre-emptive strike from a hostile ally. But the benefits of working with academic vendors developing academic products with academic licenses are blessedly straight-forward compared to licensing a business product for businesses as an academic resource for researchers studying business and students learning about business. Forbidding electronic interlibrary loan is undesirable to a library but the terminology and concepts are mutually understood between library

vendors and libraries; trying to explain to a business data provider that students are not employees so the institution cannot assume liability for their actions is generally outside their frame of reference.

## Revisiting “Just in Case” Just in Time

For conventional library resources, there is no just-in-time production, only the question of which entity prepared the content just-in-case. The researcher-author, publisher, and distributor are all working just-in-case; purchasing their wares on demand is merely *sourcing* just-in-time. Even in the realm of structured data, there is an element of preparation. In all cases, the underlying element for all the players is risk management across a portfolio, and cost-per-use is different than a return on investment. New budgeting models and reinterpretation of library mission statements are improving this blending of risk and access on our side.

Many libraries have budget lines to purchase one-off copies and throw-away services, which often run through interlibrary loan offices that purchase esoteric articles outside their reciprocal agreements. The idea is expanding. Academic libraries are getting more flexible in pursuing purchase requests and are budgeting to adjust the portfolio of just-in-time versus just-in-case. We are growing nimble and responsive . . . unless the license review takes four months to negotiate and what started as just-in-time for one user becomes just-in-case for the next. There are always new challenges. Leveraging access to content portfolios as the library seeks to balance efficiencies of discovery and access while angling for good pricing is a never-ending game.

I do not think I am saying anything new but I hope I can present opportunities in a new way. Library practitioners are presented with stresses and challenges that are often framed for failure—such as being asked for something that does not exist, being asked for deliverables with unreasonable target dates, being asked to provide new solutions with old tools, and being asked to perform new skills without adequate training and practice. Libraries continue to move forward because they are collectively and metaphorically large and battle-worn, and their mission is ancient and deep. However, there is often inconsistency of representation between the portrayal of libraries and their librarians. Some librarians may identify with the metaphor that the library that is slow to respond but, more likely, they themselves are dancing through the library halls hoping the good days outweigh the bad days.

## Imagine a World with No Libraries

Currently the market value of intellectual content varies but the content containers inflate the market value of intellectual content on a trajectory that was long ago deemed unsustainable for libraries. Imagine our system collapses and although all content out of copyright has been digitized and is essentially free for the price of advertising scrolling across the search interface but all researchers purchase contemporary research articles and raw data directly from the two remaining information vendors. All information purchased is available only to the purchaser and their research group at whatever cost the market will bear. There will come a time where “The

Collection” will refer to all recorded human knowledge and data.

## Conclusion

Work backwards from the proposition that libraries cease to exist until you get to where we are now and take comfort in knowing that there are solutions sprouting all around us. We can continue to budget for patron requests and build out procedures to quickly meet those needs. We can pre-negotiate terms and add content to master agreements that also add speed and efficiency. We can ensure that the connections and consortia we build remain intact and continue to expand. We also need to be mindful of licensing contracts. In the virtual world, the motivation “to promote the progress of science and useful arts” is not built in to all agreements and the creator of content is not compensated throughout the life cycle of the content.<sup>1</sup> Advocacy and support for the evolving value-added library is essential and one set of tools that are in front of us are the licenses. The question now is how to get the children interested in words and ideas to get interested in law.

## Reference

1. U.S. Const.. art. I, § 8, cl. 8.

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# Continuities.....

## Cataloging, Character Sets and the *Longue Durée*

By Charles L. Riley

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### Note from Ben Abrahamse, “Continuities” author and editor:

Charles L. Riley is the Catalog Librarian for African Languages at Yale University, and a tireless advocate for the inclusion of non-Roman metadata in our catalogs and discovery portals. He is also the co-founder and CEO of Athinkra LLC, an outfit that serves emerging markets in Africa and Southeast Asia through the development of fonts for non-Roman scripts that meet Unicode and ISO/IED 10646:2017. The latter, now in its 5<sup>th</sup> version, specifies the Universal Coded Character Set (UCS). I am pleased to be able to bring his unique voice into our conversation on “Continuities.” Riley’s vision of a truly inclusive catalog in which all languages and all scripts are represented and made accessible to users around the world—is nothing short of universal in scope. Some might find it utopian; I prefer to think of it as profoundly *eutopian*: thinking deeply about what is best for all the citizens of the bibliome and the technological means by which that might be achieved.

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Charles L. Riley

Persistence can be a good thing, and has the potential to yield dividends. As it is with standards, so may it be with advocacy. However, the persistence of the widely used, oft-maligned MARC standards carries with it a legacy worthy of particular attention: the MARC-8 character set, to which many libraries are still accustomed. MARC-8 was designed in 1968 to cover the need for Latin script, and expanded between 1979 and 1983 to include a repertoire of non-Roman scripts—Japanese, Arabic, Chinese, Korean, Persian, Hebrew, Yiddish (JACKPHY)—followed later by Cyrillic and Greek.<sup>1</sup>

Meanwhile, a new character encoding standard, Unicode, was developing that would come to supersede most legacy character sets. Joe Becker wrote a 1984 article that outlined the problem that Unicode was developed to solve.<sup>2</sup> The first version of the Unicode standard was released in 1991 and covered the above scripts with the

exception of the Chinese, Japanese, and Korean unified ideographs. It also covered Armenian, Bengali, Coptic, Devanagari, Gujarati, Gurmukhi, Malayalam, Oriya, Tamil, Telugu, Thai, and Tibetan. Tibetan was taken out in version 1.1, re-added in 2.0, and its original codepoints were reassigned to Burmese (or Myanmar) in version 3.0. A stability policy has been in place since Unicode 2.0 to avoid the recurrence of this kind of error.

There is a multitude of literature to be explored through metadata that is now starting to be expressed in the original scripts, yet libraries typically produce metadata in scripts beyond JACKPHY, Cyrillic, and Greek in bibliographic fields but not authority files. Although the Virtual International Authority File (VIAF) does provide the capacity to handle these additional scripts, the sources for them are not always national libraries.

One way forward, then, would be for more national libraries to join

VIAF. Another would be for members of the Program for Cooperative Cataloging (PCC) to work toward greater use of the Unicode character repertoire than is currently found in authority records. A third option would have been to keep expanding the MARC-8 repertoire itself, but this has been essentially frozen since at least 2007.<sup>3</sup> In a 2009 report, the PCC considered other options, such as Universal Bibliographic Control and Cooperative Identities Hubs.<sup>4</sup> Much work has been underway since then on the Social Networks and Archival Context Cooperative (SNAC; <https://portal.snaccooperative.org>), as well as the International Standard Name Identifier (ISNI; [www.isni.org](http://www.isni.org)) and Wikidata ([www.wikidata.org](http://www.wikidata.org)), which are both contributing sources to VIAF.<sup>5</sup>

### An Expanded Range Of Scripts

With the use of an expanded range of scripts, we could then provide users

with authorized name headings to appear in catalogs for names. Figure 1 presents examples.

Rather than the forms that would derive from the script under American Library Association-Library of Congress (LC) romanization rules, I have largely followed the anglicized usage as found in the LC name authority file for these examples. A central dilemma in the cataloging of materials in non-Latin scripts is the fact that authorized name headings are often at variance with how those names are spelled or pronounced in their vernacular scripts, and how they appear in romanized forms. This has the potential to create user frustration in retrieval.

### Challenges in the Conversion from MARC-8 to UTF-8 Encoding

In order to see wider implementation of the proposal that the authority file accommodate more Unicode characters, we must first consider the conversion of a given library's catalog from MARC-8 to UTF-8 encoding.<sup>6</sup> OCLC Office of Research issued a helpful guide that walks one through the process of such a conversion.<sup>7</sup> Terry Reese and Jonathan Rochkind have both written cogent technical justifications for taking this step of encoding conversion in separate posts.<sup>8</sup> Beyond the purely technical arguments, which in part look to facilitate better

programming and working better in a linked data environment, there are the dual notions of being open to serving users of all backgrounds, regardless of their mother tongue, and helping to preserve linguistic diversity, functions which libraries are, perhaps, in a uniquely well-positioned place to offer.

A second point is a bug that interferes in the input from a Windows language setting into the Voyager ILS. It takes input in, for example, Bengali, Cherokee, Tibetan, or Vai script and automatically turns the output into question marks. It is a longstanding bug, one for which the vendor proposes no codebase fix, but for which they

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Figure 1. Examples of Authorized Name Headings.

ᎠᎩᏉᏍᏔᏅ	Sequoyah in Cherokee
Մեսրոպ Մաշտոց	Mesrop Mashtots' in Armenian
მერაბი კოსტავა	Merab Kostava in Georgian
𒂗𒂗𒂗𒂗𒂗𒂗𒂗𒂗𒂗𒂗	Enheduanna (the first author known to humankind) in Sumerian
འཇམ་གཉན་པོ་མཆོག་	Tenzin Gyatso (the 14 <sup>th</sup> Dalai Lama) in Tibetan
Տեղախան Կանթե	Solomana Kanté in N'ko
ወለተ፡ጴጥሮስ	Walatta-Petros in Ge'ez
သန့်ဦး	U Thant in Burmese or Myanmar

## Continuities..... Cataloging, Character Sets, and the *Longue Durée*

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recommend a workaround in tweaking a certain configuration file for special characters. Such files are not exactly trivial to develop conceptually, but they can be built with reference to keyboard layouts available from the Common Locale Data Repository (CLDR). A related issue is validation; there is another configuration file in Voyager that also can be tweaked to handle an expanded range of the Unicode character repertoire. Modifications of these configuration files have been informally proposed to LC for their consideration and review.

### Variation in the Capacity of Operating Systems and Browsers

There are certain pitfalls which may be encountered in Unicode processing. Recognizing them early is the key to understanding how to fix them. Some yield lossy results, which can even be by design, and others are lossless.<sup>9</sup> The specific types of errors seen can be noted as numerical character references appearing in contexts where they should not, “tofu”, “mojibake”, and undefined or “fill” characters. The first two are lossless and leave some room for hope, the third one can be very difficult to work with, and the fourth is impossible to recover from without reference to the original source data. Numerical character references are machine-readable and may occur when UTF-8 data from outside the MARC-8 repertoire is brought into a MARC-8 environment. They take the form of, for example, “&#x004C;”, which represents the individual Latin character “L”. “Tofu” typically occurs in display when the system encounters characters in a script for which it

does not have or cannot find a font. Tofu gets its name from the fact that the rectangular symbols “□” look like squares of tofu. Tofu should still carry with it character information, even though the relevant glyphs are not being displayed. As the script coverage of many available system fonts has been improving across systems, this is becoming less prevalent, but it is still likely to happen in the case of recently encoded scripts, such as Medefaidrin or Adlam.

Lossy results are more troublesome. “Mojibake” is a Japanese word meaning “character transformation,” and may look like, for example, “ãÉÂÎÉÏÔÃËÁ”—a nonsense string of characters that do not make sense together. While mojibake is usually the result of mismatched encoding on conversion, a special case of it is found with the use of non-standard or legacy fonts that may be mapped to a range such as Latin-1. It is not necessarily purely lossy: the example above is a corruption of the word “Библиотека” (“biblioteka” or “library”), as transformed from the K018 encoding. But in many cases of mojibake, it can be unwieldy to recover the original character information once it has been misencoded. A special case that falls between tofu (in its root cause and solution), and mojibake (in its outward appearance) is the emergence of data stored using non-standard fonts, where the font may be missing locally from the system used to access the data. Undefined or “fill” characters are used in the lossy technique of converting between UTF-8 and MARC-8 and may look like this: “◊”. These are used to indicate that character information has been lost.

### Conclusion

As much as technical systems are improving, budgetary investments to support them at scale are under tight constraints. While wider use of linked data and the introduction of BIBFRAME is one way forward that leverages the decentralized nature of information production, the network it relies on arguably requires within its framework a unifying logic, and layers of proof and trust at a high level.<sup>10</sup> Providing optimal technical access to the full spectrum of the literary heritage of humankind may seem to be a lofty goal, but the means of achieving it are closer at hand than it may sometimes appear. It will require more attention to better understanding of the structures that we use, how they have evolved, and how they may still even impede our view. Lisbet Rausing, co-founder of the Arcadia Fund, argues for imagining a new Library of Alexandria, one that allows universal researching of the “bibliome.”<sup>11</sup> If anything like this is to be developed for our users, we must think strategically about what that will mean for future investments in opportunities for hiring and training staff, and in bringing about a fuller awareness of the implications of servicing the linguistic aspects of diversity and inclusion.

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2. Joseph D. Becker, “Multilingual Word Processing,” *Scientific*

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3. See Library of Congress, MARC Standards, “MARC 21 Specifications for Record Structure, Character Sets, and Exchange Media: Character Sets and Encoding Options: Part 2, MARC-8 Encoding Environment,” Dec. 2007, [www.loc.gov/marc/specifications/speccharmac8.html](http://www.loc.gov/marc/specifications/speccharmac8.html) (accessed Sept. 19, 2019).
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5. Anila Angjeli, Andrew Mac Ewan, and Vincent Boulet, “ISNI and VIAF: Transforming Ways of Trustfully Consolidating Identities,” paper presented at the IFLA [International Federation of Library Associations and Institutions] World Library Information Congress, Aug. 16-22, 2012, Lyon, France, <http://library.ifla.org/985/1/086-angjeli-en.pdf> (accessed Sept. 19, 2019).
6. UTF-8 is a variable width character encoding capable of all 1,112,064 valid code points in Unicode using one to four 8-bit bytes.
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9. “Lossy” and “lossless” refer to different ways of converting or compressing data. A “lossy” conversion technique is one that will inherently result in loss of some of the original data. It may be useful in contexts where there is no critical data loss to be expected, such as in conversion of records containing only the Latin alphabet. But for cases where content in more diverse languages is being converted, richer data is required to preserve its original semantics. A “lossless” technique allows for recovery of source data encoded in UTF-8, from hexadecimal numerical character representations, and thus should be recommended. On this technique, see Unicode MARC Forum and MARC Advisory Committee, “Lossless Technique for Conversion of Unicode to MARC” (MARC Proposal no. 2006-09), May 31, 2006, [www.loc.gov/marc/marbi/2006/2006-04.htm](http://www.loc.gov/marc/marbi/2006/2006-04.htm) (accessed Sept. 18, 2019).
10. See, for example, the “layer cake” visualization provided by the W3C, [www.w3.org/2007/03/layerCake.svg](http://www.w3.org/2007/03/layerCake.svg) (accessed Sept. 19, 2019). A useful discussion of this model appears on *Stack Overflow*; see Ian Dickinson, “What is Unifying Logic within the Semantic Stack Model and who is supposed to take care of it?,” July 23, 2012, <https://stackoverflow.com/questions/11601856/what-is-unifying-logic-within-the-semantic-stack-model-and-who-is-supposed-to-ta> (accessed Sept. 19, 2019).
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Note: Thanks are due to Erin Freas-Smith (Library of Congress), Tyler Lanigan (Yale University Library), and Daniel Lovins (Yale University Library), for their helpful feedback on early drafts of this article.

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# Interfaces.....

## Memories of an Important Conference on Descriptive Cataloguing

By Jean Weihs, C.M.

I suspect that many people who are reading this column are not aware or only vaguely aware of an important conference that took place in Toronto over 22 years ago and which eventually led to changes in the rules for descriptive cataloguing. The goal of this conference, convened by the Joint Steering Committee for the Revision of AACR (JSC) was to discuss the principles and future development of the Anglo-American cataloguing rules.<sup>1</sup> This column is not about the intellectual content of the conference; those interested in that aspect can easily read the proceedings of the conference or Michael Gorman's article in *American Libraries* in which he gives a condensed overview.<sup>2</sup>

Of all the important meetings I have attended in my many years of librarianship this was the one that had the greatest eventual impact on the rules for descriptive cataloguing. Some or many people who are reading this column may dispute this statement because the advances in the technical aspects of the computerization of descriptive cataloguing data have changed the content and look of the catalogue record and these people may be unaware of this vital meeting. The Toronto conference led to the development of changes in the catalogue record: the way each part of the record would be recorded and made searchable.

### Attendance at the Conference

Attendance was by invitation only. Sixty-four delegates arrived; more were expected but four people were unable to attend because of last minute difficulties. Of course, the largest number of delegates represented the four countries (Australia, Canada, United Kingdom, and United States) that were members of AACR2's Joint Advisory Committee and were responsible at that time for the content of the rules for descriptive cataloguing then in force in those countries.<sup>3</sup> In addition, six countries, which were interested in the development of an international set of rules, such as an expansion (and the renaming) of the *Anglo-American Cataloguing Rules*, sent a representative. Denmark, Germany, South Africa, and Sweden each sent one delegate; Russia sent three.

The papers developed for presentation at the conference were mounted on the conference website and sent to 32 professional journals, five electronic discussion lists, and four library associations. All papers were circulated to potential conference attendees and others who had indicated a vital interest in an international descriptive cataloguing code, but were unable to attend the conference. In addition to the countries listed above, comments on these conference papers were received from Costa Rica, Greece, Israel, Italy, Jordan, Norway, and



Jean Weihs

Romania. One man, who was an Iranian citizen but had studied for his library science credentials in Australia, was chosen by Australia to be one of its representatives. He delivered a major presentation about catalogue production technology.

### Conference Results

Many of the delegates came to the conference with essentially two quite different points of view: (1) throw away AACR2 and develop rules that fit the current physical possibilities of the emerging automation universe or (2) revise the text of AACR2 to make it more hospitable to the emerging technologies and rename it. Most conference delegates found the "throw it all out" stance unacceptable and voted for a careful and thoughtful revision of the then in force descriptive cataloguing rules as the way to proceed. At the end of the conference I was mandated to prepare the important content of the presentations and committee meetings for publication.

Of course, all delegates whose presentations were to appear in the conference's publication wanted to

perfect their written work to reflect changes occasioned by questions about their topic that arose from the audience and possibly in discussions in other parts of the conference. Exchanges between me as the publication's editor and the various authors took several months before the authors and I agreed that the actual wording and meaning in the published text would be clearly understood by those who would be likely to read it.

All these exchanges went very smoothly except for the contribution from the Iranian participant. The Iranian government appeared to be very suspicious about these messages between Canada and Iran. I received none of his mailed materials and he none of mine. Then our e-mail connection failed. Did the Iranian officials think that the topic of catalogue production technology was a kind of code for something subversive? Did they think that sending information to Canada was just a way of getting this possibly dangerous information into the United States? There are very many reasons that could have developed in the suspicious minds in Iran. Fortunately, the Iranian professor had a friend in England who was also a librarian (but who had not been invited to participate in the conference and, therefore, was unlikely to be on any list of "suspects"), so we were able to correspond by sending all messages both on paper and by e-mail to the

English librarian through this round-about route (Iran – England – Canada / Canada – England – Iran) and eventually I received the final copy of his presentation to be included in the conference's published papers.

### **A Little Taste of Descriptive Cataloguing History**

I have been rummaging around in my basement, which is full of documents that I once used or acquired and that I obviously thought might be useful at some future date. This particular trip to my underworld has led to the texts discussed in the following paragraphs. Some people reading this column will already know the history of the development of descriptive cataloguing, but for those of you who do not know or remember only a little bit, the following combines the documents I found there with my associated memories.

In the 1930s there were preliminary moves to produce a set of cataloguing rules that would be used in the countries where English was the principal language. There were committees in the United States and in Britain working on this idea and the possibility of a joint conference was proposed to take place in 1939. Events in 1939 leading up to the Second World War cancelled this idea. Therefore, in 1941 the American Library Association published its own "preliminary American second edition"

and recognized on its title page that the Library Association in Britain had contributed to the project.<sup>4</sup>

Despite the claim to be "Anglo-American," the first edition of Anglo-American cataloguing rules was published in 1967 in somewhat distinct North American and British texts.<sup>5</sup> The second edition (1978) unified the two sets of rules including the adoption of British spelling, for example spelling "cataloguing" with a "u."<sup>6</sup> The JSC had six members. Only two of these represented the United States (the American Library Association and the Library of Congress) and could be outvoted by those representing countries with the longstanding British spelling of words.

Language problems also appeared when rules for nonbook materials were under discussion. This did not involve differences in spelling, but rather the establishment of general material designations. For example, American and Canadian cataloguers believed that a unit containing various types of materials relating to one subject should be designated as a kit; the British disagreed, stating that a kit was a parcel containing various items that would be carried on someone's back while walking or cycling.<sup>7</sup> There were other similar word problems with a difference in meaning of terms on either side of the Atlantic Ocean, so AACR2 provided two lists of  
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## Memories of an Important Conference on Descriptive Cataloguing

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 general material designations.

As the years have passed, computers have become more sophisticated and so have catalogue records. Coding of these records has solved many of the problems created by the meaning of words in different countries and languages. Has descriptive cataloguing become an international language?

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2. Jean Weihs, ed., *The Principles and Future of AACR: Proceedings of the International Conference on the Principles and Future Development of AACR, Toronto, Ontario, Canada, October 23-25, 1997* (Ottawa: Canadian Library Association; London: Library Association Publishing; Chicago: American Library Association, 1998); Michael Gorman, “International Conference on the Principles and Future Development of AACR2 (1997: Toronto),” *American Libraries* 28, no. 11 (Dec. 1997): 24. (The title of the published proceedings was the official title of the conference. When Gorman wrote his report, he used the informal name.)
3. The person who represented Australia also represented New Zealand on the Joint Advisory Committee.
4. *A.L.A. Catalog Rules: Author and Title Entries*, prepared by the Catalog Code Revision Committee of the American Library Association with the collaboration of a Committee of the (British) Library Association, Preliminary American Second Edition (Chicago: American Library Association, 1941).
5. *Anglo-American Cataloging Rules*. Prepared by the American Library Association, the Library of Congress, the Library Association, and the Canadian Library Association. North American text. (Chicago: ALA, 1967) and *Anglo-American Cataloguing Rules*, prepared by the American Library Association, The Library Association, and the Canadian Library Association. British Text (London: Library Association, 1967).
6. Michael Gorman and Paul W. Winkler, eds. *Anglo-American Cataloguing Rules*, 2<sup>nd</sup> ed. (Chicago: ALA, 1978)—known as AACR2.
7. I do not remember the Australian position on this disagreement. As it was a member of the British Commonwealth, it is likely the British terminology was used in Australia.

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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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# Book Reviews.....➔

**Banerjee, Kyle.** *The Data Wrangler's Handbook: Simple Tools for Powerful Results.* Chicago: ALA Neal-Schuman, 2019. xx, 164 pp. ISBN 978-0-8389-1909-5 (softcover) \$67.00, ALA members: \$61.19.

Most people who work in library technical services need to work with data. Extracting, manipulating, and analyzing data and metadata have become increasingly important as librarians deal with data files created within and external to the librarians. In some cases, existing tools are available, for example, MarcEdit, software that is used widely to create and manipulate MARC records. In many other situations, librarians need to figure out on their own out how to create, extract, manipulate, and analyze data files. The *Data Wrangler's Handbook* is intended to help with these tasks.

Kyle Banerjee, the author of this book, is well equipped to take on data “wrangling” for the novice. He is Digital Collections and Metadata Librarian at Oregon Health & Science University, and the author of several articles and books. Most recently, Banerjee and Bonnie Parks edited *Migrating Library Data: A Practical Manual* and, with Terry Reese, he published the second edition of *Building Digital Libraries: A How-to-Do-It Manual for Librarians*.<sup>1</sup> David Forero, who contributed one chapter, is Technology Director at Oregon Health & Science University.

The first nine chapters of the book address basic concepts and tools in an approachable and easy-to-understand manner. Banerjee explains, “You’ll see how easy it is to do things that previously sounded difficult or even impossible using tools that are already

on your computer and that a rudimentary knowledge of a few basic but powerful concepts and tools can solve the vast majority of the data challenges you’ll ever face” (xv). The chapters that introduce concepts and tools are:

1. Getting Stated with the Command Line
2. Command Line Concepts
3. Understanding Formats (by David Forero)
4. Simplify Complicated Problems
5. Delimited Text
6. XML
7. JSON (JavaScript Object Notation)
8. Scripting
9. Solving Common Problems

Chapter 4 is encouraging because Banerjee assures the reader that even “complicated problems can be solved by breaking them into a series of steps” (35) and that the most highly skilled individuals often break problems into simple steps to be able to figure out where things have gone wrong. Earlier in the book he compares the steps to wrangling data to the steps in a recipe and the need to do things in a logical sequence. He stresses using simple tools to isolate specific data elements and convert data into formats that are easier to work with.

I found Chapter 9 particularly informative because it addresses specific problems librarians are likely to

encounter. These include viewing large files, locating files that contain particular data, finding files with specific characteristics, working in internal metadata, working with APIs (Application programming interfaces), and combining data from different sources.

Chapter 10 is titled, “Conclusions.” First Banerjee iterates a few of his key points, such as “Most formats that librarians work with are ultimately text” and “You don’t need a technical background to use the command line” (133). Most of this final chapter lists specific commands and functions that will be especially useful in libraries. These are organized into eight categories:

- Locating, viewing, and performing basic file operations
- Find files with specific characteristics
- Retrieving and sending information over a network
- Sorting, counting, deduplication, and file comparison
- Useful scripting operations
- Transforming text
- Working with delimited files
- Working with JSON and XML

For example, in the section devoted to transforming text, Banerjee give the command line to convert a file of dates to YYYY-MM-DD format. In addition to providing the command line, he follows the command with a box that

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## Book Reviews.....

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explains exactly what each element in the command actually does. Some may not care how a command operates, but others will appreciate seeing the components that make the command work.

*The Data Wrangler's Handbook* is enriched by a glossary, a list of symbols that perform important tasks, a list of the most used commands and their primary purpose, a “cheat sheet” of regular expressions, and a comprehensive index. In addition, the first nine chapters are supplemented by several figures; Chapters 2, 5, and 6 also have useful tables.

I highly recommend *The Data Wrangler's Handbook* for anyone who now manipulates data or may need to do so in the future. In Banerjee's words, “If these tasks [that require data wrangling] sound intimidating, this book is for you. You will understand everything in this book even if you have no special technical knowledge or programming experience” (xv). At \$67.00 (ALA members: \$61.19), it is a bargain.

### Reference

1. Kyle Banerjee and Bonnie Parks, eds., *Migrating Library Data: A Practical Manual* (Chicago: ALA Neal-Schuman, 2019); and Kyle Banerjee and Terry Reese, *Building Digital Libraries: A How-to-Do-It Manual for Librarians*, 2<sup>nd</sup> ed. (Chicago: ALA Neal-Schuman, 2019).

Peggy Johnson, *Technicalities* editor.

**Myntti, Jeremy, ed. *Sudden Position Guide to Cataloging and Metadata*. (ALCTS Sudden Position Series, no. 1; Susan Elaine Thomas, series editor). Chicago: Association for Library Collections & Technical Services. xii, 167 pp. ISBN 978-0-8389-4857-6 (softcover) \$30.50; ALA member \$27.75. ISBN: 8100-8576 (PDF e-book) | \$15.00. Bibliographic references appear within and at the end of chapters.**

This new series from ALCTS is a terrific idea and I would really like to give it a pure, unadulterated rave, especially since its price is so modest. However, omissions from and errors in the text make this impossible. (See below.) Nevertheless, the mostly good information it contains warrant a positive number on this reviewer's personal rating scale as well as a plea for better editing than this book—the first in the series—received.

The book is the product of seven knowledgeable authors named on the title page recto in alphabetical order: Ben Abrahamse (familiar to readers as a *Technicalities* columnist), Whitney Buccicone, Stephen Buss, Autumn Faulkner, Matthew Gallagher, Jeremy Myntti (also the editor), and Nicole Smeltekop. Although readers will find differences in language and style among its seven chapters, information is lacking about who wrote which chapter or whether some chapters involved collaborative effort. This is too bad, in my opinion. The lack of an index is a second, and far more unfortunate, omission. An index would have been helpful given that members of the book's intended audience are unfamiliar with the terms and concepts the book covers and some of these are discussed in more than one

chapter. And, although a good glossary of acronyms appears in an appendix at the end of the text, all the acronyms used in the book are not included in it. Again, this is too bad. Despite the fact that I am familiar with the subjects, I had to look up more than one acronym that did not appear in the glossary and, then, had to go back to find them, which was annoying. The last omission, from the brief biographical sketches in the “About the Editors...” section, is any mention of series editor Thomas.

The book's contents are as follows:

- Foreword, by Susan Thomas, ALCTS Monographs Editor
- Introduction
- Chapter 1: So Suddenly You're a Cataloger
- Chapter 2: Theoretical Principles of Resource Description
- Chapter 3: Learning the Standards: Cataloging
- Chapter 4: Learning the Standards: Metadata
- Chapter 5: Things You Might Encounter
- Chapter 6: Tools of the Trade
- Chapter 7: Conclusion: The Future of Cataloging
- Appendix: Common Acronyms Used by Cataloging and Metadata Librarians
- About the Editors and Contributors

.....→

Typographical errors include misplaced hyphens (pp. 4 and 5); missing words (the word “types” should appear at the start of the last line on p. 6); misspelling (“licences” on p. 84, “Standards” instead of “Standard” on p. 128, and “BNG” instead of “BGN” on p. 132); and a missing apostrophe (a sentence including the words “humans involvement” on p. 117 should either drop the “s” from or add an apostrophe to the word “humans”). More problematic to me is an example on p. 7 demonstrating the need for authority records for author names appearing in slightly different forms on different resources. The text reads “John Smith vs. Jonathan Smith, for example.” Not only is “John Smith” an example of a name belonging to many different authors (many more than 100 listed in the Library of Congress’s name authority file along with their dates), but I would assume that John Smith and Jonathan Smith are two different people, not one person whose name varies. Even if the author took this example from an actual instance, it is confusing. To make better sense, it should be “Jon Smith vs. Jonathan Smith.” It is unusual for the name Jonathan to be shortened to John, with the “h” in it. (And, in addition to decades of cataloging experience, I say this as the mother of a son named “Jonathan”!)

On the bright side, the book offers its readers a straightforward introduction to library cataloging and current library metadata schemas as well as going beyond them, to the beckoning world of non-library metadata. Just be aware that readers are going to be introduced—not educated—to these complex subjects. Many examples and lists of tools are intended to lead the reader to the more specific details that actual cataloging and metadata preparation entail, and the

book describes the kinds of decisions that are required for its performance and management. The focus is on practical issues readers are likely to encounter if they are asked to do any library cataloging, but they will have to explore far beyond this book in order to become genuine CMLs (that is, Cataloging/Metadata Librarians).

I can recommend buying this book without a problem, so long as its readers recognize that it is not a substitute for additional (and, preferably, formal) training in library cataloging and metadata. It is a way to begin and it will not make a big hole in anyone’s budget. But the cost of acquiring the tools needed to prepare new library catalog and/or metadata records able to lead searchers to the resources they want is high enough that learning more than this book teaches is a necessity, not merely an option.

*Sheila S. Intner, Professor Emerita,  
Simmons GSLIS at Mount Holyoke  
College.*

# News From the Field.....

## People

■ Coalition for Networked Information (CNI) associate executive director **Joan K. Lippincott** plans to retire on January 1, 2020, after 30 years of service to CNI.

■ CNI named **Diane Goldenberg-Hart** assistant director designate, effective September 1, 2019. Goldenberg-Hart will assume operational responsibilities as CNI's assistant executive director on January 1, 2020. She has served as CNI's communications coordinator since 2004.

■ Springer Nature Group announced that **Frank Vrancken Peeters**, previously Chief Commercial Officer, is to become the group's Chief Executive Officer (CEO). **Daniel Ropers** left the company, as per his agreement with the Board, having ensured a smooth transition with his Springer Nature colleague.

## Of Professional Interest

■ *OA in the Open: Community Needs and Perspectives* (<https://doi.org/10.31229/osf.io/g972d>), by Rebecca Kennison and colleagues, is a new white paper from the "Supporting OA Collections in the Open" project. The white paper documents a series of conversations with librarians who have expertise in collections, acquisitions, scholarly communication, and administration, from diverse institutions, regarding their experiences and attitudes towards financially supporting open access (OA) content. The project was led by librarians at James Madison University (JMU), in partnership with the Association of Research Libraries (ARL). **Supporting OA Collections**

**in the Open: Community Requirements and Principles** (<https://sites.lib.jmu.edu/OA-forum>) was an Institute of Museum and Library Services-supported project that convened a series of national forums where community members will contribute their needs, values, and priorities to the discussion of Open Access collection development, elucidating the areas of opportunity and friction and leading to a common vocabulary and framework to discuss collective funding of public goods content.

■ **Educopia Institute** announced a \$2,200,000 award from Arcadia—a charitable fund of Lisbet Rausing and Peter Baldwin—in support of the "**Next Generation Library Publishing**" project. Through this project, Educopia and its partner institutions—California Digital Library (CDL), Confederation of Open Access Repositories (COAR), Longleaf Services, LYRASIS, and Strategies for Open Science (Stratos)—will provide new publishing pathways for authors, editors, and readers by advancing and integrating open source publishing infrastructure to provide robust support for library publishing.

■ The **Council on Library and Information Resources** (CLIR) and the **Historically Black Colleges and Universities** (HBCU) Library Alliance have entered into a long-term partnership that aims to position HBCUs as centers of scholarly distinction with unparalleled special collections that illuminate clearly the value, significance, and contributions of HBCUs. This partnership will foster awareness and access to diverse historical records that shaped American history, thus informing dialog to promote the

common good. The HBCU Library Alliance and CLIR Partnership seeks to develop collaborative solutions to build community; cultivate leadership; and preserve, make accessible, and advocate for the rich cultural heritage (original bound volumes, documents, photographs, and audiovisual materials) held within HBCUs. Specific goals include (1) assessing the research value of and risks to these collections, (2) improving scholarly and public access through digitization, and (3) establishing a leadership training program for HBCU library staff.

■ A group of prominent **University of California (UC) faculty** say they will step away from the editorial boards of **scientific journals published by Elsevier** until the publishing giant agrees to restart negotiations, which stalled in February and left the 10-campus system without subscriptions to some of the world's top scholarly journals. A letter circulating throughout the UC system warns Elsevier that the signatories will suspend their services on editorial boards of the 28 Cell Press journals, which are among the premier journals in the field of biology and Elsevier's flagship publications. About one-third of all UC Berkeley scientists who serve on editorial boards for Cell Press have signed the letter.

■ **MPDL Services**, on behalf of **Project DEAL**, and **Springer Nature** signed a Memorandum of Understanding with a final contract to be concluded by the end of the year. The agreement will be open to all member institutions of Project DEAL (more than 700 publically and privately funded academic and research organizations in Germany). Through the agreement, more than 13,000 articles

by German scholars and scientists are expected to be published open access (OA) per year, making them freely and immediately available to the world and increasing visibility and usage of German research published by Springer Nature. The agreement is expected to see well over 13,000 articles a year from German researchers published OA, meaning they will be freely and universally available for the world's students, scholars and scientists to read, share, use and reuse from the moment of publication. The two-year, two-part agreement will encompass a fully OA element and a Publish and Read (PAR) element. This will enable eligible authors to publish OA in both Springer Nature's fully OA journals, the largest OA portfolio in the world with over 600 titles, and Springer Nature's collection of 1,900 hybrid journals, which collectively already publish one in four of all OA articles. In addition, the model provides the academic community of the participating institutions with permanent reading access to content in Springer, Palgrave, Addis, and Macmillan academic journals published during the term of the contract.

■ A new report from **Council on Library and Information Resources** (CLIR) analyzes the impact of the cataloging hidden special collections and archives program. *The Foundations of Discovery: A Report on the Assessment of the Cataloging Hidden Collections Program, 2008-2019*, by Joy M. Banks ([www.clir.org/wp-content/uploads/sites/6/2016/09/pub177.pdf](http://www.clir.org/wp-content/uploads/sites/6/2016/09/pub177.pdf)) presents the results of a comprehensive analysis of final reports from all 128 projects funded through the program. Running from 2008 to

2014, the program granted more than \$27.4 million to academic, cultural heritage, and other collecting institutions to catalog "hidden" collections of high scholarly value. The program brought more than 4,000 collections to light in more than 160 institutions in the United States and Canada. The report describes the methods and findings of the analysis. According to the study, nearly 98 percent of respondents reported an increase in the use of materials cataloged or processed as part of a Hidden Collections project. Nearly 65 percent reported an increase in users or visitors to the collections, and 92 percent reported an increase in reference queries. Some 44 percent reported that, because of these grants, cataloged materials were used in publications and other projects.

■ **Wellcome and UK Research and Innovation** (UKRI) in partnership with the **Association of Learned & Professional Society Publishers** (ALPSPS) have released a commissioned report and toolkit to help learned society publishers accelerate their transition to Open Access. *Society Publishers Accelerating Open Access and Plan S (SPA OPS): Final Project Report*, by Alicia Wise and Lorraine Estelle, is available at <https://doi.org/10.6084/m9.figshare.9805007>. The *Model Transformative Agreement Toolkit* is available at <https://doi.org/10.6084/m9.figshare.9805043>. Plan S, an initiative of international funders and charitable foundations called cOAlition S, seeks to move to a world where all research findings are made immediately available to all.

■ *OA in the Open: Community Needs and Perspective* (<https://osf.io/preprints/lissa/g972d/download>),

by Rebecca Kennison and colleagues, explores the idea of collective action supporting open access collection development funding. Funded by an Institute of Museum and Library Services grant, the white paper summarizes key findings from a national forum and focus groups, and recommends potential next steps for building an OA collection development system and culture that motivates the community toward collective action.

■ **OCLC and Europeana**, the digital platform for European cultural heritage, are working together to add records of millions of digitized items to WorldCat. The addition of Europeana Collections will add dramatically to the open content resources that are accessible through WorldCat. Europeana works with thousands of European archives, libraries, and museums to share cultural heritage and provide free access to more than 50 million records of books, recordings, artwork, and more. More than 24 million of these are openly licensed and freely available for work, research and learning.

■ The **Eastern Academic Scholars' Trust** (EAST) announced that six of the Florida State University System libraries, plus their shared repository collection, are joining the EAST shared print program. The libraries will join Florida State University, which has been an EAST member since 2016. They are: Florida Atlantic University, Florida Gulf Coast University, Florida International University, University of Florida, University of North Florida, University of West Florida, The Florida Academic Repository (FLARE). These libraries  
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Editor: Peggy Johnson

Publisher: Media Periodicals Division

The Kansas City Gardener, Inc.

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**Technicalities™** (ISSN 0272-0884) is published bimonthly by Media Periodicals Division, The Kansas City Gardener, Inc. All correspondence concerning editorial matters should be addressed to: Peggy Johnson, 756 Laurel Ave., St. Paul, Minn. 55104-7107 or via e-mail: m-john@umn.edu.

Indexed by *Library Literature* and *LISA: Library and Information Science Abstracts*. Full text available via EBSCOhost Library & Information Science Source.

Copies of articles available on 16mm microfilm, 35mm microfilm and 105mm microfiche through University Microfilms, Inc., 300 North Zeeb Rd., Ann Arbor, Mich. 48106.

**Subscription Information:** Six issues per year. One year, \$131; two years, \$232. Foreign subscribers \$148, one year; \$273, two years. Most back issues still available at \$25 per copy.

**Order from:** Media Periodicals Division,  
The Kansas City Gardener, Inc., P.O. Box 8725,  
Prairie Village, KS 66208.  
(913) 648-4728; e-mail: mediaperiodicals@kcgmag.com  
www.technicalitieskc.com

## Technicalities

A Publication of Media Periodicals Division

The Kansas City Gardener, Inc.

P.O. Box 8725

Prairie Village, KS 66208

## News From the Field.....➔

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will use the GreenGlass decision support software from OCLC to analyze their collective collections and develop a model to retain unique, scarcely held, and frequently used scholarly monographs.

The addition of these seven libraries brings the total number of EAST members to 65, 60 of whom are retention partners committed to retaining print monographs and/or serials and journals for an initial period of 15 years (from the original June, 2016 retention date). To date, EAST's current retention partners have made commitments to retain over 9 million monographs and some 19,000 serial and journal titles.

### Publishers and Vendors

■ **Michigan Publishing**, a division of the University of Michigan Library, and **LYRASIS** announced the creation of a new partnership to advance the work of the American Council of Learned Societies Humanities E-Book collection (ACLS HEB). ACLS will continue to oversee the selection of content, but will transfer responsibilities for the operation of the collection to Michigan Publishing, which has provided technical hosting for ACLS HEB since 2002. LYRASIS will support Michigan and keep overheads low for libraries and consortia by providing a single sales, licensing, and customer service channel.