Against the Grain

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If Rumors Were Horses

Katina Strauch

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Against the Grain

"Linking Publishers, Vendors and Librarians"

™

Inside Outsourcing Technical Services: Upsides and Downsides

by **Stacey Marien** (Acquisitions Librarian, American University Library) <smarien@american.edu>

and **Alayne Mundt** (Resource Description Librarian, American University Library) <mundt@american.edu>

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

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

In **"Gig Cataloger: Working as an Independent Contractor on an Outsourced Reclassification Project,"** **Catherine Eilers**, now at **Highland Park Public Library**, docu-

If Rumors Were Horses

Hear! Hear! is in order! What was formerly the "Scholarship for Librarians with Limited Institutional Support" is now the "**Lynn Fortney Librarian Award**." WOW! The awarding association is the **Alabama Health Libraries Association — ALHeLA**. The gregariously wonderful **Lynn** is well known by all of us! Prior to her retirement, **Lynn** was **VP and Director of the Biomedical Division for EBSCO Information Services**. **Lynn** is also the spouse of **Scott Plutchak**, another gregarious wonder! Congratulations to this power couple!

Check out **this great video from *Atlas Obscura*** that highlights **Hay-on-Wye** the small Welsh town which "was once declared an independent kingdom of books" by bookshop owner **Richard Booth** who at the same time "appointed himself its king." The rest is history.

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

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

Hoooha! **Jack Montgomery** has won the **WKU 2019** "**Margie Helm Faculty Award for Outstanding Per-**

From Your (landscaping) Editor:

Can you believe it? We thought we were getting an early spring. The temperatures were in the high 70s, almost 80! I hoped that winter had left us early. The weather has been so weird these days. Thought maybe I could try out my green thumb. Maybe.

Back at **ATG headquarters**, this issue — **Inside Outsourcing Technical Services: Upsides and Downsides** is expertly guest edited by the able team of **Stacey Marien** and **Alayne Mundt**. There are many aspects to consider. **Charles Hillen** takes the vendor perspective, **Catherine Eilers** gives the independent contractor perspective, **Emily Flynn** focuses on **OhioLink** and quality control of vendor records, **Benjamin Bradley** and **Beth Guay** are interested in problems and opportunities, **Joshua Hutchinson** wants to understand outsourcing cataloging when there is no in-house expertise, **Denise Soufi**, **Nanako Thomas** and **Natalie Sommerville** talk about a cooperative pilot project between **Duke** and **UNC-CH**,

Demetria Patrick and **Melanie McGurr** focus on health sciences library issues, **Kay G. Johnson** and **Elizabeth McCormick** weigh the cost of the service versus the personnel cost, **Moon Kim** and **Moriah Guy** focus on individual library technical service trends, **Cecilia Williams**, **Nikita Mohammed** and **Amber Seely** document the process of bringing most of the outsourcing cataloging and processing back in-house. Whew! I told you there were a lot of aspects to outsourcing technical services.

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

There are a ton of **Profiles** in this issue but no interviews. Watch for more next time! We have a lot of movement in the book reviews section — **Corey Seeman's** Roundup, **Donna Jacobs** summer reading, **Cindy Craig's** classics of sociology. **Myer Kutz** stresses the importance of

Darrell Gunter's innovation sessions, collaborative partnerships are the focus of **Xuemei Ge's** collection management column, **Biz of Digital** (**Pam Pierce**) is about transitioning to a new IR platform, **Mark Herring** offers a modest proposal for the big deal, **Roxanne Spencer** has selected ideas for children's and young adult programming, **Scott Plutchak** stresses the importance of getting people together in person to build relationships, **Jared Seay** is into games for library instruction and last but certainly not least — a new column by **Deni Auclair** and **John Corkery** about emerging content technologies focusing on the scholarly publishing community!

Well, my persistent Jack Russell (**Circe**) is ready for her noon ride on the golf cart to the post office. Pretty cold. Landscaping may be in May instead of now. Happy winter! **Yr. Ed.**

Letters to the Editor

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

Dear Editor:

RE: **Charleston Library Conference 2019 Plenary Session Videos**

Can I just say how much I appreciate the recordings?

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

Virtual options like these make a huge difference to me.

Thank you, **Shawn P. Vaillancourt** (University of Houston) <svaillancourt@uh.edu>

AGAINST THE GRAIN DEADLINES VOLUME 32 — 2020-2021

2020 Events	Issue	Ad Reservation	Camera-Ready
Annual Report, PLA	February 2020	01/02/20	01/16/20
MLA, SLA, Book Expo	April 2020	02/20/20	03/12/20
ALA Annual	June 2020	04/02/20	04/23/20
Reference Publishing	September 2020	06/11/20	07/09/20
Charleston Conference	November 2020	08/13/20	09/03/20
ALA Midwinter	Dec. 2020-Jan. 2021	11/05/20	11/23/20

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formance" which is named for one of the library's former Deans. And what a great picture of him! Congratulations, **Jack**!!!

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

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

if your library has proliferated local practices around shelving that involve the call number — and many libraries have — those practices will need to be accounted for appropriately depending on the scope of services that are wanted. And, of course, in order to generate a call number, there needs to be a catalog record from which to get it.

Catalog Records

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

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

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

Building Trust For Long Term Success

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

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

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

Conclusion

With careful planning and commitment from everyone involved, the library-vendor partnership will thrive and achieve meaningful results. I have always found that using a measured approach with careful planning works best to allow new business partners to test and measure success, and to build trust over time. The working relationship inevitably gets stronger as reliability is proven, and as unexpected issues are resolved. Engaging fully — which invariably means keeping the lines of communication open and active — will be work for both the library and the vendor in order to achieve the biggest benefit, but the effort is worth it. 🐸

University of Washington, **Hall** holds an MA in International and Area studies with an emphasis on Sub-Saharan Africa from **Yale University** and dual bachelor's degrees in Law and Society and Black Studies from the **Uni-** versity of California, Santa Barbara. **Hall** has also studied at the **Universities of Nairobi and Dar es Salaam** in East Africa.

https://www.infodocket.com/2020/01/15/ tracie-d-hall-named-new-executive-director-of-the-american-library-association/

https://www.youtube.com/watch?v=xx-MpezF2sCo

The tirelessly competent **Ramune Kubilius** sends us a link to **NLM's** Fantastic Director **Patricia Flatley Brennan's** musings about what the upcoming 2020s might bring. *https:// nlmdirector.nlm.nih.gov/2020/01/14/what-will-2020-bring/.* And be sure and connect to both her keynote in **Charleston** (Keynote Plenary: Anticipating the Future of Biomedical Commu-

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

Conclusion

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

The following suggestions come from **NEOMED** library's experience, either as something we tried or something that, in hindsight, we should have tried, to assist libraries who may find themselves in a similar situation:

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

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

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

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

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

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

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

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Hirshon, Arnold and **Barbara Winters**. *Outsourcing Library Technical Services: A How-to-do-it Manual for Librarians*. New York: Neal-Schumer Publishers, 1996.

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Blecic, Deborah D., **Saskia Hollander** and **Douglas M. Lanier**. "Collection Development and Outsourcing in Academic Health Sciences Libraries: a Survey of Current Practices." *Bulletin of the Medical Library Association* 87, no. 2 (April 1999): 178-86.

Endnotes

1. **Arnold Hirshon** and **Barbara Winters**, *Outsourcing Library Technical Services: A How-to-do-it Manual for Librarians* (New York: Neal-Schumer Publishers, 1996).

2. **Robert Sidney Martin**, **Steven L. Brown**, **Jane H. Claes**, **Cynthia Ann Gray**, **Greg Hardin**, **Timothy Judkins**, and **Kelly Patricia Kingrey**, *The Impact of Outsourcing and Privatization on Library Services and Management* (Chicago: American Library Association, 2000), 29-31, 32-37.

3. **Deborah D. Blecic**, **Saskia Hollander** and **Douglas M. Lanier**. "Collection Development and Outsourcing in Academic Health Sciences Libraries: a Survey of Current Practices." *Bulletin of the Medical Library Association* 87, no. 2 (April 1999): 178-86.

4. **Hirshon** and **Winters**, *Outsourcing Library Technical Services: A How-to-do-it Manual for Librarians*, 23.

nications) and her Penthouse Interview *https://youtu.be/Oafwv72pYb8*.

The **APE (Academic Publishing in Europe) Conference** took place in Berlin in January, 2020. **Anthony Watkinson** and **Sven Fund** attended for *ATG*. The pragmatic **Roger Schonfeld**, recently posted a report on the **SSP's** *Scholarly Kitchen* — see *https://scholarlykitchen.sspnet.org/2020/01/21/global-science-chinas-rise-european-anxiety/*.

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

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

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

Saw that **Allen McKiel** Dean of Library and Media Services at **Western Oregon Univer-**

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

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

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

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

Closing

There is no single tool or solution outlined in this paper that could have solved our issues alone. Our overall increased productivity is the result of many changes working together — as proud as we are of the macro and the savings we have achieved, we are equally proud of the ways we have responded to suggested changes from members of the Cataloging and Processing team and from the Library staff as a whole.

Outsourcing continues to be an integral part of our workflow, but we have found that it is important to regularly evaluate what specific tasks are currently available for outsourcing and their effectiveness

in our workflow. We made a conscious effort over the last two years to reframe our relationship with outsourcing so that we may provide better customer service and so that our staff feel less vulnerable and more confident of the value they bring to the system. The additional services we have been able to offer in cataloging and processing allow us to highlight in-house talent and skills. Outsourcing felt like a threat for many years, but now it is a tool to facilitate quick delivery of customized cataloged and processed materials — we can allow vendors to handle highly repetitive tasks so we can turn our attention to in-depth customizations, services, and projects that benefit our local community.

Resources and References

1. **Hahn, Joel**. OML for the complete beginner. *http://www. hahnlibrary.net/libraries/oml/lessons/index.html*
2. **OCLC Online Computer Library Center**. OCLC Connexion Client Guides: Basics: Use Macros. *https://files.mtstatic. com/site_10606/5158/0?Expires=1572016244&Signature=QO~xW5wUvhs3rJYyHpcFmHSUlEG-0Ti9hX-Q5V1rAiFRVOSxqranOqzmUGRLJktvvTRqVcDzUFbD-C4hLMc1yuxYqfE-9oyeliQk7tzhE3YlTeEk8VJdAGg-7-IF-ZILGdDkN8actm93ZkoQqdnXAfVDeLa7pPg-SIFiyzBaOt-vJKw_&Key-Pair-Id=APKAJ5Y6AV4GI7A555NA*
3. **John Lavalie's** macros. *http://www.ccslib.org/Catalogers/ index.php/John_Lavalie%27s_macros*
4. Writing **OCLC** Connexion Client Macros the simple way! *http://computerwhizzard.50megs.com/OCLCconnexioncli-entmacros.html*
5. WaltsMacros. *https://github.com/wnickeson/WaltsMacros* 🐦

Endnotes

1. *https://www.against-the-grain.com/wp-content/uploads/2018/05/ ATG_v30-2-1.pdf*

2. Libraries seeking more information about other levels should connect with their GOBI representatives for more information; The LTS may also help the library with setting-up their ILS system to work with GOBI, for example, helping with Embedded Order Data (EOD) load tables, best practice information on how to set-up the Electronic Data Interchange (EDI) vendor profile for GOBI, and optimizing the library's GOBI-Alma workflow timing.

3. An example error would include issues with matching cases on fund codes or fund codes without properly allotted funds in a library's Alma system.

4. The GobiExport workflow was originally developed for Innovative Interfaces, Inc. customers who were not able to use a vendor order number as a match point.

5. *https://calstate.atlassian.net/wiki/spaces/ULMST/pages/61112885/ Policies+Best+Practices+Procedures*

6. *http://www.ala.org/alcts/mgrps/as*

7. Libraries would need to set-up a bypass subaccount with GOBI prior to utilizing this functionality.

8. Fullerton manages GOBI purchased eBooks locally instead of in the CZ.

9. *http://www.calstate.edu/hradm/classification/R09/Library_Ser-vices_Specialist.pdf*

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

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

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

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

Legally Speaking
from page 51

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

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

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

the company had already spent more than $100 million dollars on the Content ID service.

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

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

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

Further information about the impact of the new Digital Single Market directive will be more evident as members of the European have two years to implement the law and analyze the impact through the court systems. According to the opponents, the copyright changes place

more control to the copyright holders, which are considered by the opponents as a restriction towards the freedom of speech and the lack of access to information. **Tyner** stated, the copyright directive's "overreaching, copyright protections will weaken online platforms' ability to do business cheaply, curb Internet users' ability and willingness to share information or expression, and encroach on Internet users' privacy rights in the online space."

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Rumors
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four generations of **Morgans** and the powerful, secretive firms they spawned, ones that would transform the modern financial world. Tracing the trajectory of **J. P. Morgan's** empire from its obscure beginnings in Victorian London to the financial crisis of 1987, acclaimed author **Ron Chernow** paints a fascinating portrait of the family's private saga and the rarefied world of the American and British elite in

which they moved — a world that included **Charles Lindbergh**, **Henry Ford**, **Franklin Roosevelt**, **Nancy Astor**, and **Winston Churchill**. A masterpiece of financial history — it was awarded the **1990 National Book Award for Nonfiction** and selected by the **Modern Library** as one of the **100 Best Nonfiction Books of the Twentieth Century** — *The House of Morgan* is a compelling account of a remarkable institution and the men who ran it, and an essential book for understanding the money and power behind the major historical events of the last 150 years."

I am sure that you have noticed that I am a huge lover of all kinds of books. I was interested to read **The Association of American Publishers (AAP)** *StatShot report* for October 2019 reflecting reported revenue for all tracked categories, including Trade (consumer publications), K-12 Instructional Materials, Higher Education Course Materials, Professional Publishing, and University Presses. Paper formats continued to dominate Trade, accounting for $528.6 million, or 79.9% of the category's $661.2 million in revenue

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

Discussion about SOLR, a Java open source search platform, focused on what facets to hide and how they should be ordered. We realized early in the process that our users (including individual authors and educational programs) wanted to display and navigate our collections in ways that our existing metadata strategy and the search/display functionality did not satisfy. SOLR indexes, understands the search terms a user selects, maps the search query to the documents, and ranks the returned results. Challenges in adding additional metadata fields also arose. Communication around providing for stakeholder needs and what they want from digital collections became essential.
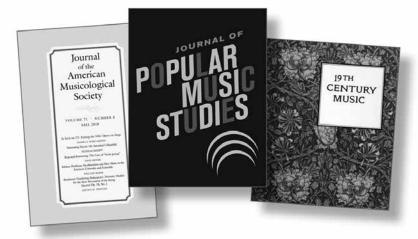
Early in the transition process, the **OHSU Library** realized they were not running the newest version of Samvera. The newer version will include an International Image Interoperability Framework (IIIF) viewer for images that will enable advanced image interactivity for users. The **OHSU Library** was not able to perform that update in-house and contracted with San Diego based Notch8 to do that work.

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

Strategic Planning

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

As of October 2019, the upgrade to the newer version of Samvera is undergoing review by **OHSU** librarians. Conversations are also taking place about what upgrades to the repository need to occur in FY2021.

Conclusions

A collection development plan would enable us to anticipate metadata needs and work within the community to create a user focused metadata strategy. We are currently in the process of developing the plan. Repositories provide access to exciting research and work generated within universities. An open source product can be dynamic and rewarding, but it requires ample local programming knowledge and a strong spirit of collaboration. 🐾

for the month. There is lots in this report. I am just stressing a few items here. Among Paper formats, Board Books contributed $17.5 million, an increase of 19.4% as compared to August of 2018. Hardback books were flat, accounting for 34.9%, coming in at $230.7 million. eBook revenues decreased by 7.3% as compared to August 2018, coming in at $86.3 million. Downloaded Audio increased 5.7% over the same month in 2018, coming in at $43.9 million for the month.

https://newsroom.publishers.org/association-of-american-publishers-releases-august-2019-statshot-report/

Melanie Dolecheck (**SSP** Exec Director) shared pictures of her adorable new puppy **Harper**, who is an English/French mastiff cross. She's gonna be a big girl!

Boohoo! The perfect **Lolly Gasaway** retired from **UNC-Chapel Hill** several years ago but continued to write the *Copyright Questions and Answers* column for *ATG*! (She never missed a deadline and her columns were always perfect!). Unfortunately, this column in

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

Moderator: **Mr. Scott Ahlberg**, *Chief Operations Officer*, **Reprints Desk**

Mr. Nick Newcomer, *Senior Director of Sales and Marketing*, **IGI Global**

Mr. John Elwell, *MLIS/MA, Director of Content Strategies at* **EBSCO Books**

Mr. Scott Pope, *MLS, Continuing Resources Librarian at* **Texas State University**

Ms. Sara Tarpley, *Director of Academic Product Sales at* **Gale-Cengage Learning**

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

Recommended Readings

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Endnotes

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

Dec19-Jan 2020 (p. 53) is her last one. But in typical organized fashion, **Lolly** has recruited her replacement, **Will Cross** from **NC State** <wmcross@ncsu.edu> who was one of **Lolly's** favorite students! And **Will** has already turned in **his February 2020 column**. **We will miss you, Lolly! Please keep in touch! xoxo**

January is almost over! Happy New Year! We continue to clear things up after the **2019 Charleston Conference** as we prepare for 2020. Just got a slew of pictures from **Reese Moore** who took fabulous pictures during the **2019 Charleston Conference**! I first met **Reese** when she was taking pictures for **College of**

Charleston publications. She has branched out on her own! Browse through these and see some familiar faces!

https://www.reesemoorephotography.com/blog/charleston-library-conference-photography

I have been reading **Peter Brantley's** (**UC Davis**) *read20-l-owner@mailman.panix.com* as much as I can. Whew! A lot to take in! And a lot of "must see."

The he's here/he's there/he's everywhere! **Gary Price** posted news of a new *Issue Brief* by **OhioLink** and **Ithaka S+R**: "It's Not What Libraries Hold; It's

Who Libraries Serve: Seeking a User-Centered Future for Academic Libraries."

https://www.infodocket.com/2020/01/23/new-issue-brief-its-not-what-libraries-hold-its-who-libraries-serve-seeking-a-user-centered-future-for-academic-libraries/

Hard to believe another year has passed! May it be the best ever! Love, **Yr. Ed.** 🐢