

## Panel discussion

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# Satisfying user demands and the impact on policy<sup>1</sup>

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**Abstract.** Satisfying user needs and expectations requires that information polices be current, flexible, and in alignment with those needs and expectations. Publishers and librarians must develop the policies, practices, and procedures that will facilitate – not inhibit – the use of their information and maximize its value to the user. They need to move beyond the “this is how we have always done it” mindset and re-evaluate policies on a regular basis. This interactive panel discussion was organized to take a look at some of the issues that concern content providers and librarians, such as the re-use, replication and sharing of data, social media, data mining, and others.

Keywords: User experience, libraries, open access, public policy, mass digitization

## 1. Introduction

Christopher Kenneally, the Panel Moderator, opened the session noting that his hotel room looks toward the Potomac River and the runways of the Ronald Reagan Washington National Airport. That morning he watched the slow, careful choreography of jets and turboprops as they ascended and descended from the tarmac. He commented that these 21st-century marvels of engineering were hardly alone for the morning commute. Automobiles snaked through the streets below his room while metro cars and freight trains ran along nearby tracks like children’s toys. He said that the scene unfolding below

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him made him aware of the overlapping of technologies and of centuries, noting that if he had waited long enough, he might have even glimpsed a river barge. Indeed it would not be a stretch to say that he could see back over nearly four centuries of technological innovation.

Kenneally noted that if we think of new platforms and new technologies as something like new vehicles and new roads across what we once called the information superhighway, we must recognize there will be the need and the demand for new traffic patterns. Just as the railroads run along the river and the highways line up with but never cross the runways, the complexities of information usage and behavior can be managed if we approach the challenge as enablers rather than inhibitors. We just heard from the startups – or the upstarts as some of you in the audience may think of them. Now we will turn to individuals from long-established, even time-honored organizations and backgrounds who view the world of change from the perspective of experience. As Tim Collins reminded us yesterday, it is possible to see change not only as revolution but also as evolution. During this session some of these traditional players will be discussing how they see themselves in the role of an enabler and how they use policy as an instrument with which to enable change.

## 2. Discussion

**KENNEALLY:** This conference has been based upon the theme of the user search experience, a topic that raises number of issues, particularly for traditional players. And, Brian O’Leary, if I could start with you, because you work with many of those players to help them discover for themselves just how they are going to make their way into the future. What happens if we don’t face these issues, Brian?

**O’LEARY:** Easy question? There’s a natural tendency to say, well, you have to face the issues or you’ll fail. But when things break or fail, they typically don’t do so in an explosive fashion. They tend to decline over time. Things become harder. It’s like you’re walking through mud or molasses. And I believe what we’re seeing now is that the things that used to be easy are now hard, and we’re not quite sure how to proceed, so the conversation that takes place within publishing houses, within libraries and in other settings is – well, we used to be able to get this or we knew how to get this or we knew how to do this, and we also knew pretty much everybody that needed to be in the room to solve the problems. Now it’s less the case. And I think that a failure to actively embrace this issue will erode the effectiveness of the established ecosystem. Other things will come in to replace it, and it’s quite possible that we, as incumbents, won’t be part of the new ecosystem.

**KENNEALLY:** And part of it, too, is to be less – that is less reactive and more proactive. As we heard from the panel this morning, those startups are approaching things from their own perspective outside of publishing itself, often, and I believe one of the panelists even described the situation as their being a layer covering over publishing, and it felt very much as if publishing is outside of these new problem solution providers. Is that how traditional publishers sees themselves, as kind of on the outside looking in at this point?

**O’LEARY:** Well, I’m sure publishing does not see itself that way, but I think that what has happened is that in effect it is apart from the new players. It’s the absence of a world view. The thing that was interesting about the startup conversations that occurred both on Sunday and today was essentially reinforcing that they are each trying to solve a specific problem. And when you talk with publishers, they do not really talk about solving a specific problem. They talk about the delivery of a particular object, whether it’s physical or digital, and sometimes they talk about access, but less often.

Publishing is not really looking at the user-experience and then backing up and working to make it better, and I think that's the big divide between traditional players and the new startups. We do tend to look at the problems in traditional ways, and I think that is a limitation.

**KENNEALLY:** Right. Judith Russell, the user-experience to which you have to respond is myriad at the University of Florida, because you have a variety of users, and a variety of collections. Talk about the place of the user experience in the way you shape policy at the university.

**RUSSELL:** I think as Brian said, there are a lot of outside forces now, and there is a lot of innovation just on the part of the users themselves in terms of trying to find new ways to interact with us and even to go around us and find other ways to get information if they believe that we are inadequate in meeting their needs. So we do spend a lot of time trying to understand what they're doing on their own, what they need from us, and trying to adapt what we're doing and not let the tradition of how we've done it before – or even the tradition of our relationships with the content providers – inhibit our ability to interact with the users and respond to the way on which they are seeking information.

**KENNEALLY:** How difficult a challenge is that then to move beyond tradition into this new approach?

**RUSSELL:** Well, it's very difficult. We have fifty thousand students, so we have probably one hundred thousand opinions on everything. That's not even counting the faculty. And so part of it is trying to address the complexity in terms of the range of content and the different styles of learning and exploration. So we find ourselves trying to be all things to all people. We still have some people who are unwilling to let go either of providing or receiving the more traditional services, and other people who are really out in front pulling us along and saying, come on, let's do it this way.

And I think that's been a challenge for a lot of libraries. You would like to think you could shed some of the old in order to reallocate resources to the new, but so often, particularly in a very large organization, you just end up stretching yourself across the spectrum rather than being able to stop some things to do others. So we are in a constant state of assessing – is there something we can stop doing now because the use has sufficiently diminished so as to allow us to move the resources forward?

**KENNEALLY:** And it's not so much stopping and starting, but making choices about what's going to have a priority.

**RUSSELL:** Yes.

**KENNEALLY:** And as you say, trying to be all things to all people is a thankless, if not a fruitless task. And your university has made some decisions about how it's going to focus its collection. We heard again in the opening discussion today about focus and keeping focus, how important that is to the mission of these startups. It's equally important to your mission at the library.

**RUSSELL:** Yes, and absolutely we are so much more engaged in digital content that if anything is being left behind or minimized it is print. We are still managing our print collections, but we are not growing them except in disciplines where print remains the major way of getting content, like in some of the foreign materials.

**KENNEALLY:** And that's important at the University of Florida because you have a special collection that is, I believe, the Digital Library of the Caribbean. So really, you are working not only across media, but also across national boundaries, across languages.

**RUSSELL:** And I believe that's been a very important part of the way in how libraries are changing in that today it is much more about collaboration. It's more about trying to find unique content from a whole variety of sources. The only way we can possibly meet the complex needs of our university is by relying on every source we can possibly tap into, whether it is commercial, open source, or through various kinds of collaborations.

**KENNEALLY:** And the subject of our discussion today is about satisfying user demand and the impact on policy when doing so. But I wonder whether satisfying demand in the ways you're talking about is really having an impact on the culture of the organization, not simply policy.

**RUSSELL:** Well, I think it is both culture and policy.

**KENNEALLY:** Distinguish those for us. How do you view them differently?

**RUSSELL:** Well, sometimes, the traditional policies get in the way of things that we want to do. They get in the way of the collaborative relationships because they don't follow the traditional models. Sometimes we end up with people who are in key positions in our organizations who are unable to anticipate and adapt to change, so we have to work within the overall structure about how they understand, permit and encourage collaboration. But we also need to work on change management with our faculty and staff to help them understand what's coming, to anticipate it, to prepare for it, and to be as comfortable as possible with it.

**KENNEALLY:** Not easy, I'm sure.

**RUSSELL:** No, but it can be a lot of fun. We were talking earlier that perhaps policy changes are among the things that make being in this environment exciting because there really is a sense that you are making a difference and that you're tilting at some windmills. It is really satisfying when you can knock one down.

**KENNEALLY:** Martha, I know that members of the American Society for Microbiology (ASM) are making change. They are discovering new treatments for various diseases. They're uncovering the very secrets of life, actually. But ASM itself is also going through tremendous change driven by a number of things, particularly the shift in the paradigm as far as the user on which ASM focuses – from the library and the subscription model, to the author, to the researcher, and to open access. Talk about how that shift is having an impact on the policy at ASM.

**WHITTAKER:** I will make it clear that I work for the American Society for Microbiology. We have two publishing divisions. ASM is a very large, diverse organization in many ways and we are involved in a lot of different activities.

Publishing and the goals of both the two publishing divisions and the goals of the Society are very closely aligned, as it should be. So some of the things I will say are true for the Society, some of the things are specifically about our publications division. But I will say that we're a not-for-profit. Membership makes a minor contribution to our overall revenue picture, and any of you who've worked with societies are not surprised to hear this. Our publications division makes up forty-one percent of ASM revenue. So when I put my business person's hat on, I'm very much revenue-driven. When I put my microbiologist hat on – although I am not really a microbiologist rather I am what we call at ASM the "science-interested public", I say information should be free, it doesn't matter whether anything makes money or cost recovers. Our goal, our mission, is to further science and to further the spread of scientific information to support both scientific research and the science-interested public, and just generally make people better understand the role that microbiology plays in all of their lives. So I forgot the question now.

**KENNEALLY:** I was asking you about how the change or the evolution (although I suppose evolution might be a kind term for it because in some cases changes have been fairly abrupt), moving from the subscription model with a focus on the library as the customer to open access with a focus on the researcher/author as the customer. Not only does this mean that how you raise revenue is going to change, but also that how you view your mission and how you approach your policy issues will change.

**WHITTAKER:** Right. And our journals division has just undergone a strategic planning exercise. They are very focused on the fact that the business model, the subscription paywall, is going away.

They are very aware that in addition to meeting the needs of our users, scientists, and researchers in the science-interested public, we need to meet the needs of our authors and ensure that ASM continues to be a place where outstanding microbiology and allied sciences is published.

So there is within our organization a renewed emphasis on marketing to the author and making sure that we understand the author's needs and wants, making sure that our publications go to press – or become available even pre-publication – quickly. We do have a real focus on this and I don't believe that anybody at this point in our history is oblivious to the needs of the author and how important authors are to us.

But we also are struggling with the fact that I said in my first remarks that the revenue that we get from publications is over forty percent of our overall revenue, and while the Society is very financially stable, we don't have tons of money. We cannot be cavalier about our finances. And so we do worry about what will happen to that revenue. I think there's pretty much general agreement that we will never make enough from the author processing charges that we have in place. We will never make up our subscription revenue. So both ASM and I in particular have two different roles. The first is to be good business people and remain aware of our costs and our revenues. The second is to support the Society's mission of making scientific knowledge freely-available. So open access is certainly an ideal to which we hold. The problem for ASM and for other society publishers of similar size is that we haven't identified the magic business model that will take us from the subscription model to the open access model.

Librarians – and I am a librarian by background, so I'm not beating up on some outside group – are congratulating themselves right now on making open access happen. They have gotten publishers to make their stuff available for free, and that's nice.

But the big publishers are in a place where it's not all that scary for them to launch a new open access journal because it's actually an additional revenue stream for them. OK, it may not recover costs, but it's a new revenue stream. And the large, well-established commercial publishers are pretty secure in their subscription revenue. As long as impact factors matter to people, the large commercial publishers that have many titles, many packages, are getting another revenue stream and are able to straddle both sides. ASM is small and publishes only thirteen journals, two of which are open access. We will be introducing two more in the coming year. For a publisher like us, it's not easy to switch over to open access. If there's somebody who wants to argue with me about this, I am certainly willing to talk about it.

I'm taking too much time. But I recommend reading, if you have not already done so, a book by Cory Doctorow entitled *Information Doesn't Want to be Free*. His thesis is not that we should put everything behind a paywall, but that we need to value information and have a valuation on information that allows us to pay the people who need to be paid to provide the value-added services. The value-added services are not only those provided by the publisher, but also the kinds of things that we heard discussed by the startups in the prior panel.

**KENNEALLY:** I'll get back to a point you made in just a moment, but that information wants to be free thing is a small hobbyhorse of mine. At the Copyright Clearance Center, we hear that a lot, but people forget that there's a second part to that statement. Stewart Brand, the creator of the *Whole Earth Catalog*, was the one who said information wants to be free. He said it a long time ago, and then he continued on saying that "information also wants to be expensive".

When he was thinking of free, he wasn't thinking in terms of no cost. He meant freely available. And I found it a rather amusing point that Micah Altman made yesterday morning, saying that "information wants somebody else to pay for it". That really struck home with me (see the section on "summing up the rules" in Altman's paper that appears elsewhere in this issue).

But one thing that I would like to note, if I can, Martha – and then I want to take this to Judith as well – is that one of the things that will happen as you begin to focus your services and your approach on the author community is that you will be getting much closer to the author. You will be collecting data about the author. In fact, you will have more information about that particular customer than you've ever had before. What kind of thinking, what kind of policy questions does that kind of data collection raise for you?

**WHITTAKER:** Wow, that's an interesting question. We've always been interested in authors because our members are, in large part, authors themselves. Many of our members of scientists. So I guess the policy changes for us are more around –

**KENNEALLY:** There's probably a need for transparency, right? You want to make sure your authors are aware.

**WHITTAKER:** Exactly. One of the areas in which my organization could certainly do better is in understanding our customers, both our members and the vast number of non-member customers that we have. Kudos (see: <https://www.growkudos.com/>) other allied services, and the startups that are working with us now, are important to us because they bring us a new level of understanding of both our authors and our customers, and we are concerned about all of these same things, the privacy issues. We know that we have a responsibility to use the information that we have about authors and members responsibly, but there certainly is a lot more information available now and using it wisely is our challenge.

**KENNEALLY:** Judith Russell, your library is moving increasingly toward digital. In fact if it is not already there at one hundred percent, it must be getting very close indeed. I know that you've been involved in a number of projects to move from the paper collections to digital, saying goodbye, essentially, to a lot of that paper. But that makes the library kind of a data warehouse, and it must have implications for policy as well. Talk about that.

**RUSSELL:** Well, it's an interesting contrast between the elimination of physical inventory and the fact that attendance at the library has never been higher. One of the slides presented earlier in this conference noted that students are at the library, but that they are not there to read the books. They are using online resources, collaborating, and doing many other things.

So on the one hand we have a high demand for technology-rich spaces for students, and on the other hand, the average faculty member you talk to can't remember when they were last in the library. Not all of them, but quite a number of them will say things like that. So they're very reliant on the content, and they're very conscious that a lot of that content flows to them through licenses that the library funnels to them by our fee structure and our payments to publishers. But it does make it difficult to maintain the identity of the library in the same way as in the past when the library was referred to as the heart of the university. That was at a time when the scholarship required physically going to the library.

So it does mean that we have to do much more in terms of outreach and liaison work so that we are where the faculty are and we contact them in their own space, not waiting for them to come into our space. And I believe that this is similar to what the publishers are doing in trying to reach out to them and not be passive in their relationships with users and authors (see also David Schumaker's discussion of the librarian's role in a paper published elsewhere in this issue).

**KENNEALLY:** But with regard to the library as a data repository, again, that has an impact on policy. I suppose in the past, when it was a more physical institution, you had to have curation policies. If you had particularly rare volumes, they had to be preserved in safe environments, etc. What are the challenges of having so much data and needing it to be accessible not only today, but also in the future? What kinds of policy issues does that raise?

**RUSSELL:** Well, certainly, we are very sensitive to all the issues around copyright and fair use and being sure that we have the appropriate copyright permissions for anything that we are creating or hosting digitally and that we've articulated as clearly as possible the policy decisions that underlie that.

We're certainly very conscious – as I think all of us are with our electronic content – that the stability of the physical book in someone's hands is very different than the stability of the electrons, so it's kind of a constant reassessment of where technology is going and how we're going to migrate things forward.

To take a simple example, I'm sure all of us have experienced having word processing files where the platform changed over time and critical things typically were migrated forward, but a lot of older things were not. So we're constantly looking at how we're preserving the content, how we're migrating it forward, and trying to be out in front of that, trying to anticipate it so that we don't find that it's obsolete before we get there. And it's a resource question.

**KENNEALLY:** And the library is not only creating data, is the way I'm thinking of it, when it digitizes all that existing physical material, but it is also as building its own collections. You've got a collection looking at the history and the development of the Panama Canal, and I believe a lot of that is not immediately catalogable, speaking as a non-librarian here. So in other words, you need to create the data as well as the metadata that goes with it, and that itself has raised policy issues. And you've made some very important choices that have been based on your experience working at the Government Printing Office (GPO). So tell us about that. What were the choices you made regarding that data that you are now creating, and how were the choices informed by a very particular experience you had at GPO?

**RUSSELL:** One of the policies that I initiated and which a number of other research libraries are now following is that as we create original cataloging records, we're putting a declaration in them that they're to be continuously made publically available. We are trying to ensure that metadata is widely- and freely-available because that is the path that gets people back to the content. We do not want any downstream restrictions on the use of any data that we've spent a lot of time and effort creating in order to make things visible and accessible. So that's one example of what we're doing with metadata.

We've done some interesting things. You mentioned the Digital Library of the Caribbean. We have multiple languages. All of our metadata is available in English, but we are also making sure that the metadata is available in the language of the original publication, so if we have something in Haitian Creole, the assumption is that somebody who could read that if they downloaded it or accessed it, they might be better able to find it using metadata that's in the language of publication. So we've had to adapt our systems and our policies to allow for the metadata to occur in multiple languages and to keep it consistent as we move among languages.

There have been a lot of those kinds of things where we've had to make a commitment about what how our platform responds to the fact that we're in a multilingual community.

**KENNEALLY:** And it also says to me that there really isn't anything you could take for granted. So in the discussion around the creation of data, you really have to think it through and imagine how the user will need to access it or how they will want to use it. And just if you could, tell the audience about how at the GPO, which is constantly creating data that is by definition of the law, uncopyrighted, and yet people are coming along and taking it and copyrighting it.

**RUSSELL:** Well, not copyrighting it, but rather imposing copyright-like restrictions, I guess would be a more accurate way.

**KENNEALLY:** Fair enough.

**RUSSELL:** When I was at the Government Printing Office (now the Government Publishing Office) we were creating a huge number of cataloging records each year for government publications that were then available to all of libraries who had collections of government publications.

When I got to the University of Florida and we were looking at digitizing material that came out of the government documents collections, I discovered that we were not getting our records directly from the GPO, but from a third party. We and many other libraries had signed contracts allowing that third party to assert proprietary rights in those records even though they were a government work and under copyright law, they were not able to be copyrighted. We worked with the company that was doing it and they backed away from their restrictions and altered their contracts going forward. But that was what started us down the path of feeling that we needed to have an open declaration embedded in every record so that it was clear that this was a public domain record, and that even if somebody else picked it up and used it another way – and we do want people to use and reuse our metadata – but in doing so they cannot impose usage restrictions.

**KENNEALLY:** And Brian O’Leary, I know you’re something of an evangelist when it comes to data and the importance of it for publishing moving forward, and particularly standards around the data. It’s perhaps true, isn’t it, that there really isn’t a point in collecting that data if you don’t have some intention to do something with it.

**O’LEARY:** Yes, I think that’s a truism. I think that the underlying point that we haven’t quite touched on explicitly is satisfying demand. I think the first thing you have to do is understand demand, because I think we’re moving from essentially supply-management to demand-management, and that’s a very different model. A few years ago I was writing about this and talked about the importance of being open, accessible, and interoperable as a principle. The critical role that context or metadata plays in discovery is a principle, and yet metadata has often been seen as a supply chain thing rather than a demand piece.

**KENNEALLY:** Great point.

**O’LEARY:** And so, when you reconceive metadata as a component of demand it becomes a whole different ballgame, and policies need to shift along that line as well. The third thing I thought was, you compete on breadth of use, not cost. Being efficient is not a really good thing, but having your content widely-dispersed, widely-used, and widely-reused is good. And business models need to be developed, but we tend to go to the business model first rather than talk about what the demand piece was. And the final thing is – and I think some libraries are getting involved in this, and certainly publishers as well – is that you’ve got to provide tools to help readers manage abundance. There’s just too much content, and this has been a recurring theme here at the conference.

The problem with these four – I’m not sure that they rise to the level of principles, but these four ideas – is that they represent a world view that does not exist widely. It’s hard for people to first say let’s organize the information this way, because you’ve had this experience. And after having first organized the data then turn their attention to the business model? How are we going to pay for it? This is a systemic problem and that’s one of the reasons I’m glad that NFAIS made this a core theme of this conference.

**RUSSELL:** I think part of the problem is related to sustainability, and it applies to the publishers, societies, and libraries. Research libraries have historically had a role in preserving intellectual knowledge for future generations as well as supplying it to the current one, so we’ve tended to focus on building collections for current use with anticipation of future use. Most of us don’t have the same financial luxury as we did before, but we’re still very conscious of the fact that we can’t really know what users are going to want and need of these materials five and ten years from now. And so our institutional responsibility and our relationship with the publishers is a really important one to try to assure that while we’re focused on the current demand, we don’t lose sight of that responsibility for what future users are going to need.

**KENNEALLY:** We cannot know what we don’t know, and that’s just life. If you’re playing tennis, you can’t know where your opponent is going to hit the ball, and I guess for Brian O’Leary that’s important because policy is usually about command and control and rigidity and all those sort of negative aspects.



**O'LEARY:** Historically, yes.

**KENNEALLY:** Historically, that has been true. And what I think you're suggesting in your blogging is that publishing needs to be agile, responsive, and so forth. So I guess that presents a kind of a riddle. How do you make policy move from that kind of etched-in-stone model to a make-it-up-as-you-go-along model?

**O'LEARY:** I think you'd say that it's really hard.

**RUSSELL:** It's fun, but hard.

**O'LEARY:** It's brick-by-brick. I think for me, what I would say is that you start with either the world view or a few scenarios. This is what the world could look like in five years. I have my four, but everyone else can have theirs. And I think once you start – and particularly if you accept the idea that it's more of a demand-generation than a supply-generation, a lot of other things begin to shift.

The thing that was most compelling for me, and I keep coming back to this, was an NFAIS event about four years ago. Thane Kerner from Silverchair was speaking and he said that their goal is to be part of workflow. Essentially, wherever the demand is, they want to be there – they want to be seen as a core component of the tool. And it really stuck with me, obviously, and I wound up writing about it in 2012 when O'Reilly Media put on a Tools of Change meeting in conjunction with the Charleston Library Conference. I was writing about it and I just said that authoring and repository as functions really have to be organized to deliver content that's distribution-ready. And the second thing that came out of Thane's comments is that competition takes place at the level of use. If you really want to be visible and useful for a particular audience, you have to be there when they need it. And that's what I think a lot of libraries are trying to do with their content right now. I don't know how many publishers are trying to do that.

**KENNEALLY:** Martha Whittaker, I know that's what ASM is trying to do in developing publications. You have this so-called responsive design – being sure that you're available from the mobile devices and so forth, so that being there when the researcher wants the content is critical to ASM. Perhaps you can tell us a bit about it.

**WHITTAKER:** Yes, I think being there when they need the content is key. We have had the book and the journal format for so long that had become very predictable, and I don't think we have made the jump quite yet to fully understanding and accepting that in the mobile phone/smartphone/tablet environment, today's content no longer has to work exactly like a book. And this change opens up all sorts of wonderful possibilities for us, but it's also a challenge. And this is a truism for all of you – those devices are changing so quickly that trying to keep up with them and trying to design the one responsive design that works responsibly for everything is really hard.

For a publishing organization like mine, where we don't have a big R&D division, we have to partner with people, and we're actually thrilled that there are people out there who are working on some of these various ways to present content with whom we can partner, because we can't do it ourselves. But we are trying to do some things. I don't know that any of you have been to the ASM website. It's really awful. It's organized to reflect the structure of the organization, and there's no reason to do that. So we're embarking on a new web design project which we will organize around our audiences. I think that's extremely important to figure out who and why someone is coming and to develop personas around that and make the website so that it is responsive to the customer – even if you're just talking about a straight HTML website.

**KENNEALLY:** And even in terms of media format, so it's not simply text. The book, the journal, all of that, were driven by text and complemented by illustrations in the past. But today, the researcher may want to see a video of an experiment or a method rather than read about it.

**WHITTAKER:** Right. I was recently at a conference, but probably a lot of you have seen this, too. Silverchair has an application that essentially repackages the content of a publisher's traditional reference books. So instead of looking anything like the book, it's rearranged into topical areas, into videos, into pictures, etc. As a result, the user can approach that reference book in a completely new and different way.

So we're talking about not only about digitizing our books, but also about developing a new format for our reference materials. And again, these are things that my organization will do in partnership with others because we don't have the wherewithal to develop them ourselves. We need to leverage the kinds of things that will allow us to repackage the wonderful content that we have in a way that's much more responsive to the needs of the user, particularly the younger user.

**KENNEALLY:** And Judith Russell, I see you nodding in agreement there. You're seeing it from a different perspective, though. Tell us about that for the University of Florida. When you go and digitize materials, you're not looking to create an identical copy, or are you? There must be some tension there.

**RUSSELL:** So for some things, we do present them in a book-like format and allow page-turning and that kind of thing, but they're all full-text searchable and approachable in a lot of different ways. There are so many of our collections where we've embedded geocoding. We have a major project in St. Augustine, Florida, which is the oldest city in the United States and is coming up on its 450th anniversary. And we have maps and images of St. Augustine over time, and they're geocoded so you can be at one location and you can see what it looked like two hundred years ago, fifty years ago, and today. We are trying to present the information in anticipation of how users will need it and how they'll approach it. And as Martha was saying, it's all about getting the right information to the right user at the right moment. The expectation of the user is "I want it now" and "you should be delivering it now", not "give me a request and we'll do something about it and you'll have it later".

**KENNEALLY:** I want it now and I want someone else to pay for it.

**RUSSELL:** Well, yes, that's true too.

**KENNEALLY:** And the other thing that users may be looking for isn't simply the image of St. Augustine over time, but for data itself, and it sounds like there's a meta conversation there about data as data, and I know that's important to you.

**RUSSELL:** It's about linking data back to those things so you could then be looking at a location and then have access to economic data or weather data or any other kind of data that is related to that place over time. So we need to do a lot of integration of information that we get from multiple sources so that we can meet the user's specific information objective when they come.

**KENNEALLY:** Right. I'm sorry, Brian?

**O'LEARY:** I'm just kind of going back to the reference you made about information being something that other people pay for. I think part of the problem is not so much with the statement, but with the notion that content can be pirated, and sometimes that has been a result of the fact that we haven't really figured out how to organize content in ways that effectively meet demand. So you hear stories of libraries and societies trying to figure out how to be effective in meeting user needs – and they see their constituents very closely. Because you're a society, you're directly mirroring your constituents. Because you're a library, you see those users every day.

But the difficulty, particularly as you go to a broader universe of publishers is that they don't see that and they don't see that interaction. And as you've heard me say – I never get tired of saying, at least not yet – is that piracy is a consequence of a bad API. If you haven't figured out how to disaggregate supply and give people what they need, then they will always be asking, well, do I want to buy all of this? I really just need the table.

And you heard the startup conversations that have occurred Sunday and this morning, and what they really to say to me is that is that they are trying to figure out ways to break apart the traditional publishing model. [Protocols.io](#) is giving the user just enough information to tell them if they are on the right track. They are not going to give them every monograph. Frequently the user just wants the financial results or the operation results that are in an Excel spreadsheet. Why then do they then have to sit there and retype the whole darned thing? And so often that occurs because that's the way we do it, and I think if we started thinking about taking apart the content, we'd be in a better place.

**KENNEALLY:** And Martha, this is a real challenge at ASM right now.

**WHITTAKER:** Yes. I just want to make a plug for going to meetings like this. A week before last, I was at a meeting held by the Professional/Scholarly Publishing Division (PSP) of the Association of American Publishers. I think a lot of you were, too. I have two things about this very topic that I kind of picked up on at that meeting and here.

As I said earlier, I'm a librarian. In the earliest days of my career, I was a librarian. I was actually a cataloguer. So to me metadata means all that bibliographic information, and I had this kind of moment of enlightenment yesterday when people were saying that metadata is really the advertisement for your content. You can draw people in by how well you present your metadata. And that was kind of new to me. I've always thought of metadata as just that stuff that you need so that people can find things. But if you think about your metadata carefully and how it can draw eyes and then design your metadata carefully it will draw people in. Metadata takes on a new meaning, not just the library meaning or not just a bunch of numbers in fixed fields. It becomes a very vibrant way of marketing your content.

The other interesting thing I learned at PSP was about "chunking" the book, essentially breaking books apart, and this kind of goes to what Brian was saying. You may not want all of the book. You just want this chart. And that's very interesting for publishers, because we've got all this data. We should be able to repackage it and customize it for different users.

For me there were two things that were really important. One is that you've got to have standard metadata so that you know what you have. The second is that you also need to know what you own, because you can't just take apart a book and assume that you have the same rights to the individual parts that you have to the book overall.

**KENNEALLY:** And, Brian O'Leary, I know this is a subject you've thought a lot about. And from a policy perspective, what are the ways you work with publishers to get them to understand this challenge and the importance of thinking in this direction?

**O'LEARY:** I was going to come back to the policy piece. If you've gotten past the world view thing that it's okay to break things apart, then we need to be agile, and the rules may have only a limited shelf life, so maybe we'll do this for a year and we'll revisit it, which is not typical policy. Maybe it's two years, but there's a shelf life on each policy and essentially a revisiting. It goes a long way.

I also try to encourage folks to not conflate policy with the business model. How we make money is not policy. What you really want to think about is, how are we going to serve the purpose, the mission, of the organization, whatever it is, whether it's a for-profit publisher, a library, a society? And then execute on that.

To the disaggregation piece, I was on Twitter yesterday, only because I wanted to keep up with the NFAIS feed. But one of my colleagues, Jane Friedman, who use to work at F&W and edit *Writer's Digest*, tweeted that she would buy so many cookbooks if only they came with a digital recipe file that she could import into Paprika, which is the tool. Users may pay more potentially for something that gives them greater functionality, or perhaps if we borrow from the EBSCO example we heard yesterday, I'll pay the same for that greater functionality (see Tim Collin's article that is published elsewhere in the

issue). There are lots of different opportunities, but it starts with the notion of the problem(s) that the users need us to solve.

**KENNEALLY:** Right. And, Brian, I think it's important that you brought Jane Friedman and *Writer's Digest* and authors, trade authors, self-published authors, into this discussion, because there's a lot to learn from other segments of the publishing world. And to the point that Martha was making about metadata as advertisement, a lot of self-published authors recognize that. That's the core of how they approach distributing their work, selling their work, and so there are some lessons here. Maybe the next conference is going to bring in somebody from the self-publishing world to tell us what they know that we can use in our worlds.

But, Judith Russell, there was a point I wanted to discuss with you very briefly around data, which is the so-called approach to data mining and what this is going to mean to the relationship that the university library has with researchers and with publishers. I know this is a policy question you've been facing.

**RUSSELL:** And that is something that we're increasingly embedding into the licenses that we have with various e-journal publishers and others. We are members of the HathiTrust, and we're actually sending some people up to their research camp within the next month or so to learn more about what kind of data mining can be done there. It's of increasing interest to our faculty, and even to some of our students, to really use content in very nontraditional ways for linguistic and data analysis. As a result we believe that this is a skill set that we need to have in order to help them do it. We need to understand what they're doing and what support they need from us to do it. And because we are still the major intermediary between them and much of the content that we deliver, we need to be looking out for those usage rights and privileges for the content to which subscribe.

And I think sometimes that's hard for the publishers. It's hard even for other data aggregators who aren't necessarily selling us or licensing us the content, but who still have concerns. Data mining is a wholly different use and they are trying to understand and figure out the policy implications for themselves. Do I care about that? Should I be restricting usage in some way? Because it is new.

**KENNEALLY:** That's a really great point, Judith. So these are raising questions which really weren't of concern before. Where did I get this data? How can I use it? Is it ethical? Do the people that we collected this data from know that their data was going to be used in this way? These are questions which are a part of the national discussion around national security, but also part of the discussions you are having within your university.

**RUSSELL:** Yes, absolutely. And I really agree with what Brian was saying about the policies. We've begun to institute within the library and within several of the consortia in which we participate a very regular basis of policies, because a decision that we collectively made and cast into stone five years ago may be completely wrong now.

That's actually an activity I'm doing right now for a meeting that's coming up in a couple of weeks I am looking at policy decisions and bringing them back to the table to have people say, yes, that's still a valid decision, or oh, no, things have moved on and we now need to change it.

We are not all in the habit of doing that. A policy gets written. It gets plastered up on the wall or filed in the filing cabinet or whatever you do with it, until an event or something comes up that causes you to say that the policy is now in my way. But we shouldn't be doing that. We shouldn't be waiting until we hit the wall and discover that policy is an obstacle. We should be looking back at those things on a recurring basis and trying to make sure that we're thinking out of the box and anticipating.

**O'LEARY:** Yes, sunset dates would be a good thing.

**RUSSELL:** Yes, it would be great for a lot of policies.

**O'LEARY:** Just to be able to review on a periodic basis, not to say you would replace it every time.

**RUSSELL:** No, but at least look at it and question, is this still the right policy?

**KENNEALLY:** And I wonder too, there's almost like a Zen approach to this that perhaps the future of policy is no policy.

**O'LEARY:** Oh, that's a long way to go.

**RUSSELL:** Yes, I think there would be a lot of people who would be very nervous about that. And some of the policies are actually very helpful in opening opportunities, so it's one thing to be sort of saying let's get rid of policies because they are obstacles, but it's another to then run the risk of eliminating policies that actually open doors and facilitate change.

**KENNEALLY:** What I was trying to get at was that the conception of policy as a restrictor, as a controller, may be something that has an expiration date.

**O'LEARY:** I think in practice – and you didn't tell us, but we all brought books. So the book I brought was –

**KENNEALLY:** The Brian O'Leary Book Club right now.

**RUSSELL:** Like the Oprah Book Club. We'll all start reading.

**KENNEALLY:** Exactly.

**O'LEARY:** The book is from about three years ago, Doc Searls' *The Intention Economy: When Customers Take Charge* and it talks about how essentially control of information, particularly personal information and how it can be used, is migrating and from the institution or the company or the society to the individual, and so the user get to decide. And so part of the policy might over time evolve to, in effect, the publisher will to appeal to the user. They will explain to the user that by giving the publisher data they will get free access or greater depth. The tradeoffs would have to be worked out over time, but I think it's going to be increasingly the case, whether it's a student in the library or me online, that I'm going to be told, if you give us this, here's what you get in return. And it's going to be an explicit tradeoff rather than buried in the terms of service or encapsulated in policy.

**KENNEALLY:** Martha, this sounds like something that would work for you with your relationship with your authors as well.

**WHITTAKER:** Yes. We had an interesting experience. Just anecdotally, I hired an assistant a few months ago and her job was to take our Twitter and social media policy manual and rewrite it. These things haven't been around that long.

**O'LEARY:** No policy could be more than 140 characters.

**WHITTAKER:** Well, I love that idea. Let's start that. If you can't articulate it in 140 characters, it's not a good policy. That would have been good. But what we discovered when she started looking at the policy manual was that it wasn't a policy manual at all. It was a how you do it manual.

**RUSSELL:** Procedures.

**WHITTAKER:** Yes. It said you do this and then you do that and then you send email to this person and let that person know. We realized we didn't have a policy. This was before I was even in this position. The people who wrote that policy manual thought they were writing a policy manual, but the technology and what they were trying to do was so new that they couldn't really differentiate between what was policy and what was procedure. You need something to start out with, so you start out and you say this is kind of how we do it. This is our best practices. And out of that should grow the policy, not the other way around. And I think absolutely this is something we need to do over and over and over.

**RUSSELL:** I think in the early days of social media, a lot of the actual policies were policies to stop anticipated bad behavior or anticipated embarrassing behavior. They weren't policies that were oriented toward taking advantage the media. They were cautionary, risk-avoidance kind of policies. I think that

the danger with policies is that we focus too much on the risk avoidance and not enough on opening opportunities.

**KENNEALLY:** As the moderator, I have a policy of making sure the audience gets a chance to ask some questions, so I'm going to hope that there are questions here in the audience, and indeed, I saw a hand right away.

**O'LEARY:** Goodbye, Chris.

**AUDIENCE MEMBER:** I want to challenge the assertion that we know what our users want. When I look at the models for design these days, whether it's Stanford School or IDEO, they get in front of their users, they visit them, and they study how they use information. The points being made about the user wanting to download an Excel file lead me to conclude that it's either we don't know, or that we haven't acknowledged it at the level where we can implement it, where we're able or willing or capable of doing something about it, because we all live in this ecosystem based on policies and procedures and economic models that have us all focused on our particular daily activity, and this really may require out-of-the box thinking. So I just welcome the comments and observations of the speakers about what you see in your world as the biggest opportunity to serve the user and the biggest challenge, and what will it take to get there.

**KENNEALLY:** Biggest opportunity at the University of Florida, Judith Russell.

**RUSSELL:** Well, I think it is to try to be more dynamic and more directly engaged and responsive. But the flip side is that we're outnumbered by a lot more than a thousand to one. So we do have to aggregate, just as each of you does, an understanding of groups of users to whom we can be responsive, because at the moment, our tools don't really let us be as responsive as we might like to be to every user as an individual. So we really are focusing on where can we see patterns of use and patterns of demand where we can adapt and respond, not to ignore the one-offs, but because it's just almost impossible to respond to the one-offs in the short term.

**O'LEARY:** I kind of left that impression probably a little bit in your head. What I was trying to say in using my two co-panelists as examples, libraries are at least closer to the people who are actually using the libraries than publishers are to the people who are using their products. And I think societies are closer to their members in the best cases because they are authors, they are contributors, they are peer reviewers, and so there's an interaction that helps shape content in a way that is more natural.

I think for the most part, publishers are not in that realm. When you listen to some of the success stories, particularly if they're startups, they're spending a lot of time looking at user behavior. I think of Miriam's role at Sparrho as an example of my job is to interact with users, with readers, every single day. There's no role like that in a publishing house. There is no product manager in a publishing house. There are editors who may say that they are responsible for that product, but they aren't.

The domino thing is theoretical. I don't know that that's true, but I know there's no disaggregation. That's a very rare activity. We produce books and we produce monographs. We produce objects, and that's our validation, the act of publishing. And I think if we continue to do that, we won't have too many more conferences like this.

**KENNEALLY:** I believe Miriam's title is Chief Happiness Officer, and we heard another one of those panelists this morning tell us their surprise when they surveyed authors and found out just how unhappy they are. I wonder whether we've kind of been overlooking that point, that happiness is an important piece of all of this. Satisfaction levels are critical.

We've been concerned about the quality of the peer-reviewed materials and all the other factors that are so critical to publishing, but happiness and customer satisfaction have kind of been overlooked, even

in the university. We want to have the biggest, the best collection. Whether people are satisfied with that collection kind of gets overlooked.

**O'LEARY:** I think the thing I'd say to authors, as an example – if you want to change how content is delivered, you have to change how it's created. In a digital environment, there's no distinction between creation, management, and delivery. They all have to fit together. It's not like three different processes. How you create content determines how it's used in a digital environment.

And so we need to change how authors think about their content, and that's that world view piece. And the only folks who are really working at understanding it are at the margins, the folks closest to the end-users, and not the publishers, for the most part. And I think that that's the real risk.

I periodically write about libraries because I describe them as the first best defense against piracy, because if you're able to deliver what users need, then the problem goes away. And also libraries generally pay for content, so even if they're giving it away for free, it's a pretty cool example. Maybe better partnership around this leads to better policies.

**KENNEALLY:** Questions? Yes? Maybe you can tell us who you are, too, and if there's a question for a particular member of the panel.

**COCHRAN:** My name is Angela Cochran. I'm the journals director at the American Society of Civil Engineers. We're in a unique industry in which our buyers – the libraries – are not our end-users. And so when we get feedback about what the users want, but also get feedback that the libraries don't want to pay for the additional functionality on top of the content, we have a bit of a disconnect.

When people ask the question, why aren't publishers being more innovative, it's because nobody wants to pay for that innovation. And the payment that we might get for adding tools that the users may want is increased usage, which may keep us from losing subscriptions, but it's not going to gain us subscriptions. So how do we work out this ecosystem model of providing value to the end-user while still serving the buyer that's the library?

**RUSSELL:** I'd like to comment on that a little bit because within the last year I had a fairly senior executive from a publishing company come to my campus. I took them to meet with my CFO, my vice president of research, and my provost, all of whom told this person that the current funding model was unsustainable, that the price increases we were seeing unsustainable because our budgets weren't growing at the same pace as the costs that were coming to us in renewed licenses.

And the immediate response from the publisher was that they were adding value and our researchers are going to be happier. All three of my university peers had the same response. They said that they recognized that publishers do not want their information to be a commodity and that they often know their field and can build a platform that has great richness and value for the researcher. But the university budgets are constrained, it's very hard for us to continue to pay for enhanced services when we can't afford to just deliver the content to our researchers.

And if push comes to shove, we're going to look for having – particularly at a comprehensive university – the broadest possible array of content. It is a luxury to try to have these additional tools, and it's a luxury that we cannot afford.

But I thought one of the values of having her come and meet with these people was for her to understand that I'm not an obstacle. The budget flows through me, but I am deeply and richly-connected with my administration and my faculty and am actively seeking to represent the best interests of the whole community. And while that might not mean that I'm going to really help my civil engineers with the added value that you can provide, I'm going to try like crazy to be sure that your content is there.

And I know this was a big issue as the discovery services came up and in effect facilitated bypassing the individual platforms onto which some publishers had put a lot of effort. And I do know that many of

our researchers and graduate students know your platforms and go directly to them. They are not going to be using a discovery service because they are deeply into your content and they value the way you deliver it.

But I think it's an economic problem right now that is happening in almost all the research universities. We're coming out of the recession. We're all hoping things are going to get better. But at this point, I am offering less content to my students and faculty than I was four years ago. And so my ability to say I'm going to give up even more in terms of the comprehensiveness of my content in order to pay more to get a better value for a slice, it's a very hard choice, and one I wish I didn't have to make.

**KENNEALLY:** A candid answer there. Thank you, Judith. Do we have questions on this side of the room? Anyone with a question for our panel? Yes. And tell us who you are.

**SHUMAKER:** Sure. Dave Shumaker from Catholic University. I wanted to follow up on that comment that was made toward the end about users giving publishers their information and they will receive added value in return – the kind of tradeoff of personal data for customization, personalization, and value. And I'd like to really get Judy as the librarian and Martha as the recovering librarian to respond.

**RUSSELL:** (laughter) I think we're both in recovery.

**SHUMAKER:** Many of us in ALA – the American Library Association – are very, very concerned about personal data. Libraries have policies, but they have been kind of watching the front door while the personal data goes out the back door. They delete their book circulation records, but they don't pay attention to what the vendors are getting on the digital side. So I just wonder if you both would follow up and assess the prospects for librarians and publishers to come together to build that model whereby personal data can be shared, it can be safeguarded, and it can be used to add value.

**KENNEALLY:** I'd like to comment before we get to the responses. Policy is for communities, and there's a community here of publishers, librarians and users that are essential components for policy development on this issue. The whole notion of people coming together to solve the problem is important. But, Judith, do you want to take the question first?

**RUSSELL:** Let me say to those of you who don't know me personally that one of the reasons why I'm an NFAIS member and even an NFAIS Board member is that I became familiar with the organization when I worked in government. When I went to academia I saw enormous value in remaining active because NFAIS is the place where non-partisan conversations are taking place between the not-for-profit, the for-profit, the government and the library sectors.

I've sent a number of my staff to NFAIS meetings since I went to Florida, and they all come back saying that they now realize that when they go to library conferences they are talking to people who are like themselves, but when they go to NFAIS, they are learning how other people view these issues and opportunities and they are learning other ways to address common problems. So that's a little advertisement, but I think a valid one for what's unique about this organization.

I'd bet there's not anyone in the room who doesn't have an Amazon account and who doesn't look at the recommendations Amazon provides based on your purchase. I think a lot of our students, a lot of our users overall, are very trusting of that service. They feel very comfortable with the concept, so this idea that we're increasingly finding services that are recommending services and helping somebody say, well, if you use this, you probably should also be looking at that, I think has become an expectation. But you're right. I don't think we or the users have sufficiently thought about the consequences of exposing the data that is needed in order to receive such a service.

For a lot of the content that the University of Florida licenses, we do so through an IP address range, so you may see that people from the University of Florida are searching, but you're probably not able to identify the individual doing the searching, because their identity is masked through the IP range. And



we at the library suffer from the same thing. It is hard for us to say how much of that use was coming from this college or this set of users for whom we are trying to provide support. It isn't often that volume that really should matter. It's how critical the data is to that research team or that particular group of users.

**KENNEALLY:** Martha, I know that ASM publishes a privacy policy on its website and it goes into great detail on some of these questions. Respond to that notion of the concern around privacy and what we give up when we give up personal data.

**WHITTAKER:** This is not a library/publisher problem. It's ubiquitous because everybody's going through this. We want all of the services require that we give up our privacy. We want to be able to locate the closest Pizza Hut. We want to be able to find out how we get from my house to yours. We want to have somebody provide sidebar ads on the items for which we are shopping. We like this, and most people kind of get a kick out of it. But at the same time, we're going, oh my God, my privacy! What am I letting out?

In the medical community we have some fairly good protocols about what you can and cannot disclose. But even those are subject to breach. So I think as a society, we either have to get over our obsession with privacy or figure out what the rules really are and make sure that they're fungible enough to change needed, otherwise this battle between the desire for customized services versus the desire to retain privacy will rage forever.

**KENNEALLY:** Brian O'Leary, a last word on policy and privacy.

**O'LEARY:** I would just say that I am very much in the camp of favoring privacy in all these settings, but what I was advocating earlier is a decision that's controlled by the owner rather than by the institution. No one reads a terms of service agreement that effectively allows a publisher or service provider to gather all this personal information in the background. I think it should be an explicit tradeoff where the transparency is there.

**KENNEALLY:** Right. Well, I want to thank our panel today, Judith Russell, the Dean of University Libraries, University of Florida; Martha Whittaker, Senior Manager, Marketing Strategy, American Society for Microbiology; and Brian O'Leary, Founder/Principal of Magellan Media Consulting. Thank you all for a terrific conversation on how policy is impacted when meeting user demands related to information usage. Thank you so much.

## About the participants

**Christopher Kenneally** is the Director of Business Development for the Copyright Clearance Center (CCC). In addition, Kenneally is host/producer of CCC's weekly podcast series, *Beyond the Book*, and for OnCopyright Education, CCC's Educational Services brand, he presents a variety of programs on copyright and intellectual property issues.

As a freelance journalist, Christopher Kenneally reported on education, business, travel, culture and technology for the *New York Times*, *Boston Globe*, *Los Angeles Times*, and *The Independent of London*, among many other publications. He also reported for WBUR-FM (Boston), National Public Radio, and WGBH-TV (PBS-Boston). He is author of *Massachusetts 101* (Applewood Books), a history of the state "from Redcoats to Red Sox" ([www.mass101.com](http://www.mass101.com)).

**Brian O'Leary** is the Founder and Principal of Magellan Media Consulting, an organization that helps enterprises with media and publishing components capitalize on the power of content. A veteran of more than thirty years in the publishing industry and a prolific content producer himself, Brian provides

targeted solutions that help you achieve positive change, improve your financial results and respond with agility to consumers' voracious appetites for content. In addition to his work with Magellan, he writes extensively on publishing industry issues and is the author of in-depth and insightful research reports on topics from territorial rights in the digital age to the use of metadata in the book industry supply chain. Brian co-edited the book *A Futurist's Manifesto*, a collection of essays from the "bleeding edge of publishing".

**Judith Russell** is currently the Dean of University Libraries at the University of Florida. Prior to this position, she was the superintendent of documents at the U.S. Government Printing Office (GPO), a position that she held from 2003 to early 2007. Russell also served as Deputy Director of the National Commission on Libraries and Information Science, the Federal agency that advises the President and Congress on the information needs of the American people. There she helped develop and implement Commission policy and was responsible for the day-to-day operation of the agency from 1998 until she accepted the appointment as Superintendent of Documents. From 1991 to 1996, Russell was director of GPO's Office of Electronic Information Services (EIDS). Russell's special library experience includes COMSAT Laboratories, the Program of Policy Studies in Science and Technology at The George Washington University, and the U.S. Congress Office of Technology Assessment. She also has provided management, marketing, and technical services for private technology companies including Mead Data Central and the Disclosure Information Group. Russell received her B.A. Cum Laude, from Dunbarton College of the Holy Cross, Washington, DC, and an M.S. in library science from The Catholic University of America, Washington, DC.

**Martha Whittaker** is Senior Manager, Marketing Strategy, at the American Society for Microbiology in Washington, DC. She joined ASM in 2013 as Platform Product Manager for ASMscience, the society's digital publishing platform. Prior to that, she was Director of Content Management at the George Washington University's Gelman Library. Martha has held management positions at Blackwell Book Services, ProQuest, Knight Ridder, and the UnCover Company. She has degrees from the University of Utah and Denver University, and a certificate of Advanced Study from the Haas School of Business at the University of California, Berkeley. Her interests are electronic publishing, open access business models, and library collection development.