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ATG Interviews Beth Jefferson

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Technology Left Behind — Social Discovery: An Interview with Beth Jefferson

Column Editor: **Cris Ferguson** (Electronic Resources/Serials Librarian, James B. Duke Library, Furman University, 3300 Poinsett Highway, Greenville, SC 29613; Phone: 864-294-2713) <cris.ferguson@furman.edu>

The Canada-based **Bibliocommons** (<http://www.bibliocommons.com/>) provides a social discovery service geared towards public libraries. Recently, **Beth Jefferson**, founder of **Bibliocommons**, spoke with me to discuss social discovery tools and the ways in which **Bibliocommons** is addressing the needs of public libraries. **Oakville Public Library** in Oakville, Ontario is the first client to go live with the **Bibliocommons** service. **Bibliocommons** is a young company, in terms of library implementations. All of the libraries that they are about to roll out are in what they call validation view (testing) and in staff training. None of the libraries are public in their releases apart from **Oakville**. While the company is young, they have big ideas about social discovery and big ambitions for creating a discovery service that will enhance the user experience.

CF: *What makes Bibliocommons unique in the world of social discovery?*



BJ: The big thing for us is to bring together into a central database all of the library’s social data, and then to synchronize that database. We don’t really store records and data. We cache in one database the local records of all of our participating libraries: full bibliographic records, including item, MARC, and authority. Although we’re noted and associated with social discovery, this is really what distinguishes us. It’s a fundamental rethinking of what search can and might be.

As you know, **OCLC** brings all of the records and holdings into a central database. We bring far more than just holdings. We bring current item status and authority records, as well as all of the library’s local MARC records into this single data repository. We synchronize that every 15 minutes with every participating library. So, there is no batch uploading of anything. It’s all just synchronized automatically into a central database.

CF: *Just to make sure I understand the concept of the single database, the database contains data from all of your participating libraries? For example, a user at Oakville who does a search could be pulling metadata or tagging terms from a library in Toronto.*

BJ: That’s right. **Aquabrowser** also has implemented the infrastructure to do this at a basic level and have it indexed back into the local search. The sharing of social data is not unique to **Bibliocommons**. What distinguishes **Bibliocommons** is that we are very focused on the public library. One of the things that is most important to people is, “What can I get now at this branch? Where do I find it?” You can’t get that information from search results or quick queries, if you don’t hold the item records with the item status in the search repository. So, for us, including the item record in the search database was very key.

We work with a local MARC record, not a universal MARC record. If a library’s local cataloger has put anything in a local notes field or put in different or additional subject

continued on page 54

headings, those are picked up in the search. We also load in the library's authority record and item status.

We initially actually started on a 24 hour sync basis and found that it was too frustrating for patrons. Sometimes the catalog would say an item was available when it wasn't, or it would say the item wasn't available when it actually was. That was when we stepped back to synchronize on a 15 minutes cycle. In an academic library, it wouldn't matter as much, because the circulation just isn't as high. But in a public library whether or not an item is available is actually one of the most important pieces of information that people are looking for.

CF: *Public library patrons are much more interested in physical items, whereas in academic libraries people are much more interested in access to a particular resource.*

BJ: Absolutely. The public library is very different in so many different dimensions than the academic library, which is why we made the decision to focus entirely on the public library.

CF: *I hadn't quite realized that Bibliocommons was entirely focused on public libraries. How many libraries do you currently have in the validation stage?*

BJ: We currently have eight that we are working with.

CF: *Are they all Canadian libraries?*

BJ: No, our first U.S. libraries are Santa Clara and Oceanside. We are working with libraries that are very interested in redefining the edges of social discovery. In most cases, they found us. There is one in Missouri and one in Australia. We have really designed this to be a highly automated process.

CF: *Do you have all of the servers in a single location? Does the library have to install a server of its own?*

BJ: This is software as a service. The library installs one piece of software in its ILS environment, and that does all of the synchronization, data exchange, and authentication. It talks back and forth with the **Bibliocommons** system.

CF: *To what degree do the quirks of an individual ILS system affect the software? Or, if you are exporting data into Bibliocommons, does it matter what ILS a particular library is on?*

BJ: It does matter. This is what takes so much time, the integration with each library system. As you know, ILS services vary widely in terms of how they present the item record and holdings data. We want very much to map the item records to a universal interface that allows for us to work, and eventually to display, across libraries. We start with the local record. Instead of saying, "These are our standards. You have to conform to them," we have developed a mapping interface that allows us to map individual libraries to a universal format. We ask the libraries through an elec-

tronic survey to tell us where certain pieces of information are located, and then we map the results to a universal format. So, libraries can still maintain their local cataloging practices. Public libraries don't invest in cataloging with the same rigor that academic libraries do.

CF: *Public libraries have a very different approach to cataloging. The focus is on getting the item into the patron's hands. They are not necessarily interested in representing all of the nuances that academic libraries are. I think as more and more academic libraries are moving toward electronic access, as opposed to acquisition of physical items, some of that cataloging rigor is fading. Academic libraries are moving towards shelf ready programs and they are outsourcing some of that. The emphasis on cataloging is diminishing, I think.*

BJ: In the public library world, if you include movies and all genre audio, fiction is 60-70% of the lending. Children's is a third of circulation. Even a lot of the non-fiction is some kind of genre, like biography. It is really recreational reading. Public library patrons are not necessarily reading a book because it is about something. With this type of reading, the traditional focus on LCSH just doesn't help libraries at all. If you take a kid's picture book, it is helpful to know that it is a picture book, but there isn't even a classification for that. There is one classification of Juvenile that spans ages 0 to 16. For discovery purposes in the public library world, there are many other ways that I think will add at least as much value as the traditional metadata. When these elements are taken in combination with the traditional metadata, the potential is great.

CF: *In reference to social cataloging and tagging, do you expect those kinds of terms to be used more in terms of search and discovery?*

BJ: It is early days yet. Most library catalogs, when they have implemented tagging, have not been successful in generating adequate participation for the data actually to be useful. We have found, and this is supported in the academic literature, that most people don't tag for social purposes. They do it for personal purposes. They do it to catalog their own collections, which is why **LibraryThing** has been so successful. People don't build their own libraries for the benefit of other people. They like to have a virtual representation of their own bookshelves. They also want to be able to add things that they may not even have on their shelves, such as a book somebody lent them or they borrowed from the library. They still have a place to keep track of what they have read, seen, and heard.

We found in our research that the motivation for personal record keeping was one of the primary ways to engage users. So, our tools are very much focused in that way. You can build collections, but are not limited to your local library's collections. You can add titles from **Amazon** or from other libraries to your collection. It's a complete collection of everything you have read, seen, or heard. We have users that have put in 5,000 items. We designed our tools to support this collection. A very basic

collections tool that just paginates won't allow users to sort or to search. In our case, we put facets in people's collections, so that they can actually manage it like a large results set.

We've really tried to understand different people's motivations for engaging in what we call this architecture of participation. We want to understand the potential entry points and how to build participation over time. If somebody just starts by adding titles to a collection, can you get them to rate them? Once they have rated them, can you get them to make comments or add tags? We find that there are some users who like to tag; some who like to add favorite quotations; others who add summaries; and some who add comments. But they are usually very different people.

CF: *I actually wrote a column on this not too long ago. I am a crocheter, and I participate in an online community called Ravelry. Ravelry is not only an online community, but also a database of yarns, yarn stores, and patterns. They have included the capability for people to catalog what they are making, how far along they are, and how it is going. People can keep track of what yarns they are using or what hooks or needles they need. Ravelry does include a tagging function, but I very rarely tag my items. I do use it as a personal library of the yarns I own, the hooks I own, and the patterns I would like to make. It is the same principle, but it has been specifically designed around the world of knitting and crocheting.*

BJ: That is exactly our experience in looking at this. And yet most services, when you look at **WorldCat** or **Aquabrowser**, haven't been designed this way. The capability to manage what you contribute and to organize it and to keep large collections is very limited. We think that personal collections are one of the primary entry points into engaging large communities. We have put a lot of emphasis on tagging and on adding reviews and comments, but, in fact, the process of just adding and deliberately building a collection creates very valuable data in terms of our ability to provide users with personalized recommendations. And that is really where we are going with all of this; towards personalized recommendations. Recommendations for content, recommendations for people you might want to connect with, recommendations for community resources. You really can't build personalized recommendations until you know something about people.

So, I need to know what you read. Your borrowing history is one thing, but there are privacy concerns if it is not explicitly contributed. Also, it is just messier data. There are lots of things that you borrow that you may not end up reading or are borrowed for someone else. Whereas, when people add things to their collection, they are adding things they've read, seen, or heard. It is just cleaner data. We generally assume if there is no rating, that they liked it. If they add a rating of their own, it gets us one step closer.

CF: *The rating gets you a little bit further. They can say, "I did read this book, but it*

continued on page 55

Technology Left Behind from page 54

wasn't to my taste. I did not care for it." So, when you are trying to create these personalized recommendations, things that are rated poorly can be weighted lower in the algorithm.

BJ: That's right, but only for that particular person. This is the thing that Amazon does right now. They say, "People who liked this also liked..." But, take for example *Harry Potter*. There are tens of millions of people who liked *Harry Potter*. You can't make a recommendation for something that everyone who liked *Harry Potter* will also like. It is not possible, because they all liked *Harry Potter* for different reasons, and they all have very different reading profiles. I am going to make a very different recommendation for the eight-year-old who liked *Harry Potter* than the English teacher who liked *Harry Potter*.

If you think of the short head and the long tail, those kinds of algorithms typically push users towards the short head, towards more of the same. If I am looking for a book that the 20 million people who liked *Harry Potter* would also like, I have to find the thing they are most likely to have in common. It is going to be another very generic, very common title.

If I start to break the 20 million people down into small groups, where I can look at their reading profiles as a more complete representation, I can look at the edges and the long tail of it, as well as the very common elements. I can start to make much more interesting recommendations.

CF: *Regarding the building of these profiles, you mentioned that an English teacher who liked Harry Potter is going to be very different than the eight-year-old who liked Harry Potter. Is there a place in the profile for people to input demographic information like that? Or is that something you observe from their reading habits?*

BJ: It's really about their reading habits. You can certainly have a third grade teacher who is reading everything that their third grade kids are reading. Generally, though, if you look at them as a whole, the third grade teacher will also have other things that indicate a difference from the third grade students. She will have her own reading in there as well.

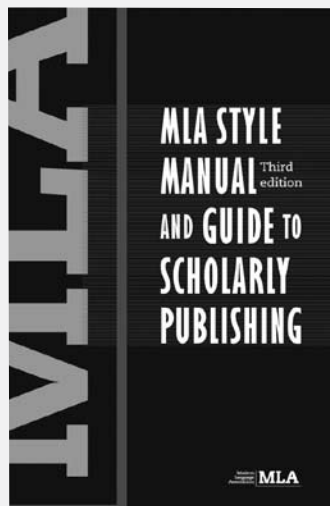
There are lots of technologies that allow you to cluster people into like groups on the basis of a more complex profile. The key is really to engage the user. Typically, we've thought of reviews. Well, we don't need everybody contributing reviews. How many reviews do you really need? That is why our focus has really been on the collection building. We want to engage the broad user community in doing collection building. If they rate things, over time we will be able to recommend other items.

CF: *I recently gave a talk at ALA about the acquisition of eBooks. One of the points I discussed was the wide variety of eBook platforms that are available. When trying to select a platform, one of the things I think that academic libraries really need to focus on is the question of what value the platform adds to the eBook. Many platforms allow users to create their own accounts, building their own library of eBooks. Users can save the books they like the best, highlight passages they liked, or even annotate the text. It will be interesting to see if down the road there is a way that users can start to link their accounts. If they have a collection on LibraryThing, plus a collection on an eBook platform, and a collection of books in their public library, do you think there will be ways down the road to connect those accounts?*

BJ: Absolutely. It would be very unfair to users if there wasn't. Users have no interest in six different places to put all of this information, and we think the public library OPAC can be that home. It makes a lot of sense, because the OPAC is the place for engaged public library users. This is another thing that is so different about public and academic libraries. The OPAC in the academic library really is kind of a sideline. It is not the main event, and it shouldn't be the main event. Most students probably won't ever use anything in the OPAC on most campuses. In the public library, the traffic and volume through the OPAC is huge. 80-85% of a library's Website traffic is to their OPAC. This again points to the importance of personal record keeping

continued on page 56

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and account activities; a third of OPAC views are typically to the account pages.

We've been talking with a service called **Book Glutton** (<http://www.bookglutton.com/>) about developing this type of community. **Book Glutton** uses its platform as a way to build community while you are reading a text. The service allows you to add notes to a text, which are viewable by others. Somebody could respond to your note in the margin. So, the conversation builds, anchored to a particular point in the text. **Book Glutton** just hasn't had a critical mass of users, which is what I think the public library could bring. We've been talking with them about a partnership that would allow the data that is created to authenticate against the ILS. Patrons could have library communities that would be accessible through their accounts.

CF: *Is there anything that you would like to add, or that we haven't addressed in terms of social discovery tools? Anything you would like to specifically mention or highlight?*

BJ: If I have one thing that I really want to get out there, and I think the conversation has gone this way, but, it is sometimes worth accentuating, I really don't like the term social networking. It sounds too much like an add-on. Like you can put in **Facebook** connect and make your library "social." Or add comments and it becomes social. Social discovery is how people find things in the real world, and all we are doing is enabling these social tools to be used for the purposes of what libraries are all about, helping people navigate information. People navigate information socially; we do it offline. We ask people for recommendations; we get the opinions of people whose judgment we trust. It is really just central to enabling people to connect to others whose opinions might be valuable to them. While you may not meet someone face to face, by having read users' comments or looked at what else they are currently reading, you develop a sense of certain people and how their opinions match your own.

A lot of the value of collection building and annotation is the context that is established. I see somebody's review, and I want to put it in context. Well, what else did they like? What else have they read? If I am trying to figure out whether I should trust their judgment on something I don't know, I look to see what their judgment is on things that we have in common. 🌿

Column Editor's Note: *Many of the things Beth and I discussed provided me food for thought. I hadn't equated the use of online recommendations to the social recommendations I receive from friends, family, and colleagues. Social discovery tools take what we do in real life and translate it to the online format. My thanks to Beth for the time she took to speak with me and her extreme patience in explaining the nuances of social discovery. I'll be checking back with her in six months or so to see how the rollout of **Bibliocommons** has gone at the participating libraries. Stay tuned! — CF*

From the Reference Desk

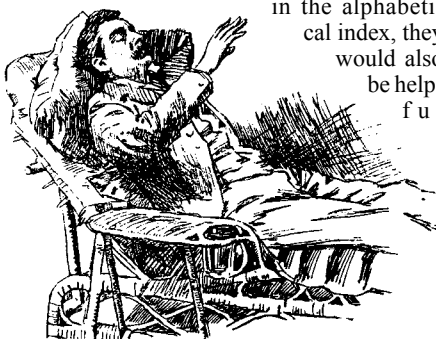
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The **Berkshire Encyclopedia of China** (2009, 0-9770159-4-7, \$675) is a unique five-volume reference that sets high goals for itself. It attempts to offer an up to date, comprehensive, and multidisciplinary look at one of world's oldest and complex societies. In addition, it intends to reach a broad audience including students as well as interested lay persons and professionals to "expand their knowledge of all things Chinese." Given its lofty mission, "this work could have, quite easily been twice the length," as publisher **Karen Christensen** admits in her introduction. However, readers will be pleased to learn that **Berkshire** uses the allotted five volumes to do justice to the scope and intricacy of its subject.

The set contains some 800 articles that can be divided into eight broad categories including: Arts and Culture; Geography and Environment; Governance; Language and Learning; Organizations; Science, Technology and Medicine; Society and Social Welfare and Values and Worldview. The articles range from brief entries of 500 words to lengthy essays of as many as 6,000 words. Each article title is listed in English, Chinese Characters, and pinyin transliterations with tone marks. As with many recent **Berkshire** titles, the **Encyclopedia** is heavily illustrated with "1,200 unique photographs" as well as numerous sidebars, maps and other illustrations. The writing is crisp and to the point but scholarly, well researched, and authoritative. While many of the contributors are affiliated with colleges and universities in the United States, it is fair to say that an international cast of China scholars and professionals contributed to the **Encyclopedia**. Each article also has a useful list of "further reading." The subject coverage is thorough and touches on a myriad of elements within Chinese history, culture, and society. While there are biographies of major personalities, they are not a major focus of the set. Acknowledging this, **Berkshire** is planning a companion set entitled the **Berkshire Dictionary of Chinese Biography** expected out in 2010.

The alphabetical index in volume 5 is generally helpful but the set would benefit from a topical index grouping related articles. And while "see also" references are provided

in the alphabetical index, they would also be helpful



placed at the end of each article. One mistake was noted in the index. The article entitled **Encyclopedias and Dictionaries** is listed in the index as being in volume 1, page 175-179. It is actually in volume 2 on pages 699-703. This seems to be an isolated typo since this is the only instance where this problem appears. It may also be unique to the copy under review.

Overall, the **Berkshire Encyclopedia of China** represents a major effort to fill a void in the reference literature. Numerous students, scholars and lay readers will find it timely, relevant and highly useful. The **Encyclopedia** is the type of reference work that possesses multi-library appeal. Patrons of academic, public and high school libraries will be drawn to its unique content and accessible format. Given this, it is a title that deserves serious consideration by a variety of libraries. (Interested libraries should also keep in mind that free one year online access comes with the purchase of each set and an institutional license to the online version can be purchased by itself for \$129 per year.)

ABC-CLIO adds another title to its respected series of military history references with the recent release of the **Encyclopedia of the Spanish-American and Philippine-American Wars: A Political, Social, and Military History** (2009, 978-1851099528, \$295). Edited under the leadership of **Spencer C. Tucker** who is responsible for a number of other award winning military encyclopedias, this three-volume set provides readers with over 600 entries that explore the multiple facets of these seminal, but often forgotten, conflicts.

As you might expect much of the focus in these volumes is on military issues. There are entries on specific battles, individual battalions and corps, military camps, and artillery, weapons and ordnance, as well as on naval ships, individual commanders, and related conflicts like the Cuban War of Independence. But as the sub-title indicates, this set is concerned with more than the military aspects of Spanish-American and Philippine-American wars. There are entries that highlight the politics of the time and its leading politicians, the crucial role of the press, the impacts of new technologies, and relevant social developments. The production standards are high with 350 photos, 16 maps and other useful images complementing and enhancing the text. Each entry has "see also" references as well as brief bibliographies. The set also includes profiles of the involved countries, a glossary, a chronology and a selected bibliography. But perhaps the most useful value added feature is the primary source documents that comprise the third volume. There are 153 relevant documents ranging from the Monroe Doctrine setting forth a basic

continued on page 57