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ATG Interviews Ann Okerson

Dennis Brunning

Arizona State University, dennis.brunning@gmail.com

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Associate University Librarian, Yale

by **Dennis Brunning** (E Humanities Development Librarian, Arizona State University) <dennis.brunning@gmail.com>

Column Editor's Note: *Ann Shumelda Okerson has been Associate University Librarian at Yale since 1996. Ann also has 15 years of academic library and library management experience, including the commercial sector and the Association of Research Libraries. She has made major contributions to the understanding of serials pricing, electronic journals, and consortial pricing. Currently she leads international projects to build a Middle Eastern digital library. I interviewed Ann recently. — DB*

ATG: Liblicense and Liblicense-I — ten years old and going strong with over 3,000 followers. Does this surprise you? What have been the most memorable threads? Any teachable moments?

Ann Okerson: *Liblicense-I* started when the world of library licensing, in particular for Web-based journals, was young. I remember conversations with **Academic Press** in 1995 at their booth at the **Frankfurt Book Fair**; these led to libraries' first important e-journal deals. **AP's** "IDEAL" offer to consortia — and similar early forays into the electronic world — led in January 1997 to the start of the list, as a place for sharing expertise and current news and opinions. Around that time, the **LIBLICENSE** Website was launched, as an educational resource with growing numbers of links, model license information, and licensing software — it provides also an interface to the list archives. So, we're approaching 13 years, with 14,400 messages under our collective belts. The number of signed up readers is now over 3,400 and still growing gradually. We do hardly any marketing, and we're still mail-list-

based, in order to reach easily subscribers on all continents, including Antarctica. A number of countries still have connectivity and bandwidth issues, so plain text is most workable for them. (The Website's still got a little 90s flavor about it, because I never found anybody to replace the student who set it up in the first place — he went off to make a lot of money as one of **Amazon's** first 200 employees!)

Of course I'm surprised and pleased that the list has remained a valuable and lively place for talking about important issues, as well as an educational forum that library school professors assign to their students! A few people have even told me that their postings on the list have enhanced their careers. What started out as a discussion closely focused on licensing has moved into broader topics related to e-publishing, scholarly communication, events, usage measurement, and more. The fundamentals remain focused on what it takes to bring the best scholarly and scientific resources to our users, but we've realized that doing that is more than just a question of licensing techniques and principles. When the list stops serving a useful purpose, it will go away.

Memorable threads? Hard to say, because so many ideas have passed through the list. At one point, I was asked to create a "*Best of Liblicense-I*" for a library organization's publications program, and the number of interesting threads proved just too many to make the project realistic. After trying for some months, I gave up.

Teachable moments for me have been less about content and more about moderating, editing, and how wedded people are to their postings, even though the postings are not research articles. People don't like even a word changed — they feel it alters their intentions. There are repeat posters who tire or bore readers — that can be a delicate issue. I try to err on the side of including nearly everything, and thus some readers will be offended. But, I try to not repeat postings that are well covered on several other lists, and that causes complaints at times. Mostly, I'm surprised at how many list readers have written to me over the years, when something about the content or style of a message has irritated them, and am deeply grateful for the interest — and the opportunity to engage in an offline conversation about how to be a better moderator. Still, it seems that mostly we've struck a balance that keeps the list valuable. There have been a few legal issues where we've benefited from advice of counsel when asked to redact postings out of the archive for one reason or another. Those may have been the most teachable of all!

ATG: Open Access gained attention, in part, to Stevan Harnad's subversive proposal published in your 1995 book (co-edited with James O'Donnell) *Scholarly Journals at the Crossroads: a Subversive Proposal for Elec-*

tronic Journal Publishing. Where is open access publishing now after fifteen years of active debate? Still a subversive proposal?

AO: Open access is a fascinating and important idea and topic that has a way of polarizing people instead of unifying them. You can see already in that 1995 book a near-religious undercurrent of enthusiasm. It's sobering to see that in the 14 years since that book, the world of expensive licensed information has burgeoned beyond imagination; at the same time it's encouraging to see that the passion many of us share for making information as broadly available as possible remains strong; and, finally, it's disheartening a bit to see, over and over, that people who are very close to each other on questions of principle can sometimes turn disagreements about implementation into fierce mud-slinging. On the one hand, open access has come into common parlance as a business model (i.e., about finding ways to cover costs up front so that publications are free to all at point of reading) and, on the other, it is an idealistic goal, part of the Internet notion that all publications can and should be free to all readers at all times. My biggest worry is that focusing on this issue in debate mode makes it harder to get attention and enthusiasm to other elements in the chain of things that have to happen and keep happening in order for the broadest possible access to be achieved.

ATG: It certainly was the summer of the eBook with new consumer market devices coming on board and mass media interest in e reading. Do you Kindle? Will academic libraries ever Kindle?

AO: Indeed the whole eBook "thing" is finally taking off. Suddenly, it's a horserace among devices and formats and platforms and vendors and business models, and right now the clouds of dust on the back straightaway are obscuring my vision, at least. It's clear that eBooks will be a format of choice for many readers in many settings and that **everything** will soon be published with some kind of digital representation as one of the options. I knew the eBooks moment had arrived when in the September 2009 issue of *Conde Nast Traveler* there was a review of the **Kindle** and **Sony** readers. My first thought was, "WHY is this here?" My second was, "of course, travelers READ," and using a device like this saves us carrying tons of tree matter in our luggage and running out of books part way through a trip in a region where one can't just have **Amazon** free-ship the book you want, ASAP. When I travel and walk up and down the aisles on the Acela or airplane boarding lounges, I see now a mix of eBook readers and DVD players.

And there are announcements galore — **Sony's** partnership with **Google** for 500K public domain books for free; **Amazon** exploring this space to provide free as well as priced books.

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the number of sexual partners but refers to the number of spouses, and "agnostic," which refers to whether the existence of God can be proved rationally so that a believing Christian can be an agnostic.

To end with a humorous anecdote, I tell my students about the out-of-print book market that, for many of them, conjures up the image of old, musty, expensive books. One of them even wrote during the weekly assignment that her library didn't use the out-of-print book market for older materials. "It bought them from **Alibris**."

I'd like to hear from you at <aa3805@wayne.edu> if you have further thoughts on a better name for the out-of-print book market that my wonderful panel of experts somehow missed. 🐼

The \$9.99 price point (**Amazon's** preference) is controversial. One publisher after another is striking deals, exclusively or non-exclusively, left and right. By year's end no doubt the availability of free and priced online books will have grown by another few hundred thousand books, thru some device or another. But we don't have anywhere near sufficient standards, interchangeability, and user consensus right now. By the way, here's a really good eBook reader comparison site that came my way this week: <http://ebook-reader-guide.com/>. I wonder how different it will look when I check again in a month?

Initial librarian forays into the reader-device space seem to suggest that reading appliances connectible directly to the public Web work best for our licensed devices, so that, for example, the **iPhone** is a better bet for our readers content-wise — but possibly a poorer bet in terms of readability and functionality (size being a limitation). Some libraries and organizations are working with the **Sony's** and **Kindles** of this world to load their devices with pre-fixed content that can be used for classroom readings or for training in developing countries, and this is promising. **Duke University** recently announced a project that makes images available to its campus, via **iPhone** and **iPod touch** devices. A **Google** search turns up a number of experiments in this space.

ATG: *This summer we also saw some pushback to the Google Book Settlement. What is your sense of how this is going to play out for academic libraries?*

AO: Depending on what you are reading these days from different groups (library associations, European nations, the Register of Copyrights, the Attorney General of Connecticut, and many others), the **Google Settlement** appears as if it might be heading for a train wreck (or at least that any outcome or resolution is fast receding into the future). As someone who's mostly a fan of the **Settlement** (let's have it but let's adjust some pieces of it), I'm thrilled that we could have far wider and easier use of orphan works, for example, and that libraries may be able to make available to their readers content from what one critic calls "The **Google** Vending Machine" (aka library workstation), i.e., some millions of cross-searchable full text books.

Perfect? No, of course not, but it's a great start. And I'm amazed that we can have such a potential boon to readers everywhere, and such grumpiness about **Google** books' current imperfections. Younger scholars seem to have noticed the grumpiness less, and that's encouraging: they're forwarding around links to books they need and could never afford to buy, very happily. I'm disappointed where my librarian community is seen to block or derail such a great opportunity for all our readers. I want our community to work together to make the content better, more usable, to preserve it: that is our job, not **Google's** (the **Hathi Trust** folks seem to have figured out some library roles and responsibilities pretty quickly.) I sup-

pose I'm saying there **needs** to be something like a **Google** settlement, and its successors with other aggregators — and soon; whether the one in the courts now is exactly how it turns out is far less important. I would give my eyeteeth to be able to participate in crafting a library licensing agreement for **Google** books.....

ATG: *There seem to be old magazines scanned into Google Books. Apparently magazines become books if they are old enough and digitized by Google. Instead of "green OA" as an open access strategy, why not just have Google digitize academic journals and just say "oops?"*

I'm not sure "oops" as a defense has standing in the courts, at least in this country, but as we like to say, **IANAL** (I Am Not A Lawyer). You may be on to something in this one sense: an increasing number of journal publishers seem to be good with the idea of making their backfiles available, at least up to a certain point (like five years ago). At this time, **Google** is not a reliable source for access to journals — a big part of the difficulty lies with **Google's** metadata and linking practices, which are widely and well discussed by our colleagues and by scholars in other venues.

ATG: *Your ICOLC (International Consortium of Library Consortia) "grille notes" are legend for clarity, wit, and thoroughness. Plus you were quick about them — you super-blogged ICOLC. Do you miss this role?*

AO: You're very kind! Perhaps I could claim to have invented a certain kind of blogging? I still make and send out notes about the North American spring meetings, but less so now that the publishers and vendors all provide their PPT slides. It's not as interesting any longer to try to recapture all the actual vendor presentations, but I try to grab the Q&A after the vendor "grille" sessions and really enjoy that part of it. Generally, I can't attend the fall (European) **ICOLC** meetings (time and money), and I miss seeing commentary from there, as the programs are strong and their discussions are no doubt as exciting as the North American ones can be. Also now that anyone can blog — it's less fun to do it. But, surely, there must be somebody in the back row twittering every word of B sessions in 140 character mouthfuls, mustn't there?

ATG: *Many of us are looking for the reverse gear for the Big Deal. Others are concerned about miles per gallon but keep driving. Is the big deal a sustainable model? Is there life after the big deal?*

AO: That's the \$64,000 question isn't it? For all that we've been talking for over a decade about different journal access models (free access through institutional repositories, PPV, just in time, and so on), and for all that the economic downturn has hit libraries, and for all that libraries say they can't afford the big deals, our practice suggests otherwise. The thing is, our users value the easy access, reliable brands, known peer review services, and many other features that a highly organized journals industry offers (with its indexing services, cross-links, DOI, and much more)

Perhaps one of the big differences between

the world of formal publishing vs. new open access outlets, rests on the relative lack of organization to the OA materials. OA materials are largely new for us. Until or unless that changes A LOT, and the OA world is much better integrated into existing structures, libraries will be offered and many will accept the big deals at increasing annual prices. These are prices we truly can no longer sustain without compromising the rest of our collections and services. We're all in a prisoners' game about this situation, and if I had magical wisdom, I'd certainly offer it. Invest some money in creating or supporting new alternatives, services, and crossovers to existing journals, of course, but how to figure out which ones? Is any alternative better than none at all?

One thing that strikes me: the notion of the "journal" as the priceable object may be past its prime. **Everything** (except for a few high profile titles) comes in bundles nowadays, and users (and libraries) see huge advantages to this. So, again, until we get to closer to a magically frictionless world of interoperability and functionality, I suspect that user and librarian interest in easy access to information packaged and processable by the traditional publishing players will dominate.

ATG: *Academic libraries support research, teaching, and study with million dollar content and database budgets. Download stats on average are in the millions. Our metrics, as they say, are great. Yet we still worry, believing our stuff is hard to find. Thoughts?*

AO: Nobody has time enough to answer this one, because we're all too busy reading, downloading, printing, and clicking on links! Welcome to the new world of super-information, where everybody is competing for attention. Nobody's ever satisfied, and probably never will be. That's a bit glib, but the topic merits days of analysis.

ATG: *Visual information — art images, data tables, multimedia formats — is getting popular. As we know, popularity costs. Can the academic library get into this business while trying to maintain traditional information sources?*

AO: You had the \$64,000 question a few back. This one is probably the \$64,000,000 question. Take it larger: just how much of our culture's productions can we save, index, analyze, and organize? Should somebody be archiving and managing the history of reality TV? Are we capturing the remaining soap operas in enough detail? I believe it's going to take a long time before we get to anything like a stable point, where we have an idea what our society's overall collecting mission looks like and how to get at it. For most of my life, the **Library of Congress** has been the asymptote — the super-collection, bigger and better than everything else in the world. **LC** probably owns and manages, what, 1% of the total content of print and digital? Or way less? We used to live by a river and dip cups in, hoping for rainy years when there'd be enough water. Now we're all living on rafts in the middle of an ocean where the wind blows all the time. Get used to it, I want to say.

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Statewide Library Depository Coordinator, OhioLINK

by Meris Mandernach (Collection Management Librarian, James Madison University) <manderma@jmu.edu>

ATG: *Dona, in the past year you started in the position as the Statewide Library Depository Coordinator. Tell us about it.*

DS: I am now halfway through a two-year appointment to look at the depositories' collections and services, to begin a de-duplication process, and to make recommendations on other aspects such as preservation of the physical collections and additional services that might be offered.

ATG: *What is the state of the depository system in Ohio? How have depositories in the state worked in the past? How would the state like to see them work in the future?*

DS: There are five state-supported depositories in Ohio which were initially funded by the state legislature to relieve crowded conditions in the state university libraries; these depositories were regionally located and controlled by the institutions that contributed materials to them. In the past few years, we have come to understand that the depositories could be an even greater resource for OhioLINK if they work together as one system rather than as five separate facilities, and if we maximize the space in them by looking at the number of duplicated titles across all five.

ATG: *What is the single greatest challenge in the coordination of the depositories around the state?*

DS: Undoubtedly, it's reaching consensus among the many institutions on a wide variety of topics: how many copies of titles should be maintained in the depositories? What is the relationship between the depositories and the contributing institutions? How are statistics counted by contributing institutions? There are literally dozens of such questions that we

have been, and continue to discuss.

In addition, we also have to deal with the limitations of high density depository buildings. Such facilities are great for storing materials, but they're not very efficient for retrieval, and they are extremely inefficient when we start thinking about withdrawing duplicated titles and having to find a way to fill in those empty spaces.

ATG: *You mentioned coordinated collection development across the state of Ohio. What measures are currently in place?*

DS: A number of OhioLINK institutions participate in the **Yankee Book Peddler** approval plan, which provides information on the status of each title at OhioLINK institutions. The "Not Bought in Ohio" project also uses the **YBP** database, allowing selectors to run reports on titles in specific subject areas that have not been purchased by an OhioLINK institution. In coordination with **OCLC**, a series of reports examining OhioLINK collections in depth are giving librarians an unprecedented chance to see data on individual institutions and on the consortium as a whole, to discover what subject areas are collected at what levels. Nearly from the beginning of OhioLINK, there have been subject groups made up of all interested librarians from throughout OhioLINK who exchange information on subject-specific resources; some of these groups have coordinated actual collection development among their institutions.

ATG: *What impact do you anticipate that Google Books will have on requests for materials in off-site storage?*

DS: For out-of-copyright materials, it's possible that the number of requests might go

down, although there are enough problems with the quality of digitization that people will still need to see the physical item or need a scan of an article from the original. But for in-copyright materials, it could very easily lead to an increase in requests, as people using **Google Books** discover content from keyword searching in the full text of books and journals.

ATG: *How do you think off-site storage will work in the future? Will the trend to more electronic materials negate the need for off-site print storage?*

DS: We will always need off-site print storage, but perhaps not for exactly the same things that are housed there today. As regional and national cooperative projects are discussed and implemented, we probably won't be keeping as many copies of a single title in one facility or one system. But our special collections and archival collections will continue to grow and will probably take up an increasing amount of space in our off-site facilities.

ATG: *Tell us about yourself. Where are you from originally? What do you like to do? Read? Anything you want to tell us?*

DS: I was born in Ohio and raised on a farm and in a very small town in south central Ohio. I received my BA in history from **Ohio State**, a PhD in Arabic & Islamic Studies from the **University of Edinburgh** in Scotland, and my MLS from **Indiana University**.

I like to garden (with varying success), knit, read, work puzzles, and cheer on the **Columbus Blue Jackets**. Also, my friend (and Charleston regular) **Heidi Hoerman** and I travel to birdwatch, look at wildflowers, and generally enjoy less-congested parts of the US. 🌿

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ATG: *A faculty colleague of mine remarked that academic e-journals and eBooks were one way or another pdf platforms. I was about to argue when it dawned on me he had a point. We run predictable technology. Can we do more? Should we?*

AO: There are lots of PDF's out there, but I think your colleague is too pessimistic. There are more and more publications using non-fixed formats, interactive, media. It's inevitable there will be many more and better. And PDF, remember, is a clunky, unusable format for handhelds and even cute little netbooks. Give it 20 years and we'll remember PDF the way we remember 5 1/4 inch floppy disks.

ATG: *We just passed the 20th anniversary of F.W. Lancaster's article in College and Research Libraries where he speculated on the future of librarianship and libraries. Lancaster predicted that electronic communication systems would end print publishing as we know it and bring the end to traditional libraries. Whither or wither libraries. Take us out with your take on Lancaster's bold prediction.*

AO: Lancaster was right in predicting that e-systems would bring tremendous changes. He may not have been right about the print piece of things (that print would end and thus would end the role of libraries), because the consequences are proving much more nuanced, dramatic, "unintended," and far reaching. Print will still be with us as one favored format, but there will be whole orders of magnitude more information, in a host of new formats besides.

New technologies give new opportunities to libraries, opportunities that we are beginning to seize. Librarians are becoming more in touch with users and less preoccupied with the exact types of objects we collect. These are very exciting times to be in our profession. The other day, I was describing to one of my medical specialists an international digital library project we at **Yale** are working on and also an upcoming UN project meeting. He said, "Sounds like I should have been a librarian instead — compared to you all, we're like wallpaper." I meet people on planes who can't stop talking about **Google** settlements, online information, rare maps, how great their public library is, and asking me what I think about these things, as they get out their **Kindles** to read books — instead of watching the airline movie. Who would have thought it?! 🌿