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Papa Abel Remembers — The Tale of A Band of Bookkeepers, Fasicle 9: Growing Pains
by Richard Abel (Aged Independent Learner) <rabel@easystreet.net>

In mid-1964, the Approval Plan was in relative good order and a number of academic and research libraries had accepted it. Now it was time to expand our territory to libraries along the front range of the Rocky Mountains and the adjacent Midwest tier of states. Word-of-mouth about our firm had spread from librarians west of the Rockies to librarians east of the Rockies, leading some of the latter to contact us in Portland, San Francisco, or Los Angeles. One of us would then travel to that library and any nearby ones to tell the firm’s story and express our interest in working with them. Armed with the Approval Plan, a more elaborate standing order system, and a capacity to deal with library-initiated orders, we were able to present a more compelling story than in the early days. As some old-timers reading this tale will recall, the rapid growth of libraries, institutions of higher education, and research establishments, the latter as an adjunct to the growth of new manufacturers, led to a high demand for experienced librarians. Consequently, a number of librarians moved across the country. As some of the librarians we had worked with on the West Coast moved east, they contacted us for a visit. These librarians were acquainted with the services we offered, so our initial trips were usually devoted to meeting with the established acquisitions/bibliographic staff, enabling them to size us up in response to the newcomer’s recommendation.

We also began to mount a more public stance. Our first assay in this direction was to attend the ALA Conference in San Francisco, headquartered at the St. Francis Hotel. With Fred Gullette, Tom Martin, and I in attendance, all three of us could “work the halls” in order to learn how we might organize attendance at future meetings of librarians. We ran into many old friends with whom we had worked, and we invited them to Fred’s rather large room for a drink and a place to rest their heels between meetings. Word soon got around that we had opened a “hospitality room.” Before the conference ended, we had entertained a number of old friends and all manner of others with whom we had never worked nor were ever likely to work with. (Calls to room service for more bottles of liquor and mixers became increasingly frequent.) The three of us had used the day before the conference to plan our next steps, but we stayed a day after to formalize plans for our attendance at future meetings: the principal conclusion was to open a hospitality suite so the person whose room was used for guests had a place to retire. These events led us to open an office in Denver. As good fortune would have it, Jim Cameron called shortly thereafter to seek a position. Jim had been a “detail man” for several medical/dental/nursing publishers. He knew the book trade and a heavy travel commitment did not deter him. His preferred way of travel was his Packard, which he endorsed as the gold standard of automobiles. He was an extremely pleasant fellow and a wry, cynical humorist. Because of his experience, Jim required minimal training, which was held in Portland and consisted of some hands-on exposure to selecting books for Approval Plans. Jim joined the firm just before the fall round of ordering from the publishers’ advance catalogs of forthcoming titles. We added copies for the Denver office inventory and completed our Denver Approval Plans. After a few months spent in the Portland office, Jim was off to Denver to locate and furnish an office. As the firm was working with very few libraries in the Denver territory, the opening of the Denver office represented a

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This convinced me that we had to develop a permanent written and readily accessible record of each library’s instructions as to what books they wished to receive on approval. By this time, the Approval Plan had evolved to provide not only subject needs but also what we came to call “non-subject parameters,” including such title characteristics as country of origin; clothing of the publisher’s level of difficulty; series designation; publisher exclusions; reprints, etc. These characteristics had to be included in an information/knowledge system to meet the firm’s internal needs.

During my after hours, I began to devise such a system, as daily routine work and travel occupied roughly 65-70 hours a week. Fortunately, as a student at Reed and an autodidact, I discovered that I not only did my best mental work from about 10:00 in the evening until 2:00 or 3:00 in the morning but that I could make out four to five hours of sleep a night. After my family had gone to bed, I set to work on the system. This job took about three months to complete, much of that time spent in research on knowledge organization. This research had its foundation in the work of Bliss, now, unfortunately, a forgotten name. I then turned to Dewey’s system, the British Library modifications of Dewey, and, finally, a close study of the Library of Congress subject authority compilation. These systems provided the professional contexts within which librarians thought about such matters. Lastly, I turned to the course catalogs of the institutions we served, for they were the contexts in which faculty conceived of their fields and their relations to one another.

With this research in hand, I organized a subject listing that the managers would use in soliciting information from the libraries. First, we would give a copy of this listing to the head of acquisitions with the understanding that our manager would return in a couple of weeks to go through the final version with the acquisitions staff. During this interval, the acquisitions staff would consult with faculty, catalog librarians, circulation librarians, bibliographers, and the acquisitions group to make certain that the Approval Plan would serve the library as effectively as possible.

Then I turned to compiling a list of non-subject parameters. I consulted with all the managers and any others, such as Don Stave, who had a close relation to the libraries’ collecting behavior. At this time, I was telephoning the managers a couple of times a week to keep them abreast of the rapid developments in Portland and the other offices and to stay current with developments in their offices. With these two parts of the “library profiling worksheets” compiled and pulled together, I turned this work over to Don Stave and the managers for their critical evaluation. When these critiques were back, I modified the subject and non-subject parameters as appropriate. We then sent out this revised profiling questionnaire in bulk to the managers responsible for the first operational step, putting into a permanent record all the Approval Plan requirements of the participating libraries. The regional office retained a copy and sent a copy to Portland for forthcoming ordering purposes. At last there was a shared written record of the Approval Plan information/knowledge in the firm. How very reminiscent of the product we were trading in!

Now I well understood, as did the managers, that we had just handed our competition the guts of our Approval Plan system from which they could easily and quickly organize their own versions. They could solicit a friendly librarian to pass a copy to them, but that was the price of recording and publishing information/knowledge — and we knew we must — and we paid the price. Despite the hazard we had erected for ourselves, we saw no genuine alternative if we were to guarantee the libraries continued top-level customer service for their Approval Plans, regardless of personnel changes and unforeseen contingencies.

About this time, the management travel load in the Los Angeles office led Tom to hire Oliver Sitea to assist with the operation of the Approval Plans and the management of the office inventory. Oliver had a strong retail background, having worked in some of the leading bookstores in the Los Angeles area. In time, he would join the Portland operation to take over the forthcoming book purchasing.

In the fall of 1964, we began to discuss the place of computers and information technology in our operation. While our manual systems were working well, it became increasingly evident that as sales volumes increased, this would overwhelm them. We were quite unsure as to how to proceed. Tom Martin started looking around the Los Angeles area for some help with our considerations. He learned of Ralph Shout and worked for Informatics and was doing some interesting things with computers. Tom recommended that we retain Ralph as a consultant. Ralph came to Portland in early 1965 for a continuing series of consulting sessions that eventuated in the firm moving into the arena of information technology a year later.

As a step to improve the efficiency of our operations, Paul Sibley urged us to move to more spacious quarters. One late afternoon in the spring of 1965 when I called into Portland, Paul said he had just leased a building about three times as large as our present one, and that we could move in June. This was the beginning of a period of a continual need for additional space. Paul’s initiative was typical of the entire management group. A great team was shaping up, motivated by a profound commitment to the world of serious books and to the advancement of hypotheses. Additionally, all were dedicated to the transmission of that knowledge to the next generation. In short, all were great bookmen, a team that would be difficult to recreate. None was fearful of facing and dealing with risk. The quest they joined was fraught with risk from day one, which would be their constant companion to its conclusion. In moments of reflection, the group brought to mind the journey of the Argonauts. This same spirit and commitment to learning and the accumulation of knowledge informed not only the new additions to the management group but also much of the clerical staff responsible for ongoing daily operations.