

Sue Polanka

# NO SHELF REQUIRED 2

Use and Management of Electronic Books

The biggest challenge in terms of managing workflow for the library is evaluating the e-book for selection. The arrival of an e-book on approval takes the form of the e-book being turned on or made accessible to the library for review. Whether this access is in the form of a full-book preview or by selected sections is up to the publisher. Librarians need to be able to evaluate the e-book in as complete a manner as possible and want to encourage publishers to provide complete access to the e-book content for selection purposes.

Delivering e-books on approval presents another new issue for print approval vendors, since there is not a physical item to send and fulfillment is largely out of their control. Vendors have had to develop back-end systems that notify e-book providers to turn on content for the appropriate library. Some vendors have built into this process a system that allows the library to review and reject content before invoicing.

Another complicating factor for vendors that provide approval services is that there are now multiple sources for the same content. Constructing systems that can automate selection while ordering e-books from multiple suppliers based on profiling tools is a challenge. Vendors face several difficult decisions. Should each aggregator's version be profiled separately? Should vendors supply the first available edition on approval or incorporate wait times so a library can prefer one platform over another? How should vendors weigh price differences between platforms? The simple logic of most approval plan databases developed in the 1990s cannot easily be adjusted to accommodate such complex decision making.

One reason the development of e-book approval plans has been relatively slow is that historically there has been a significant delay between the availability of a print book and the availability of its e-book counterpart. This delay period is rapidly decreasing, but today only about 10 percent of print books handled on approval at *Comix Information Services* have e-book alternates available at the time of profiling. However, libraries willing to wait ninety days from the date of print availability for an e-book may be able to get 30 percent of their approval content in e-format. Since publisher workflows for e-books are considerably different than their print workflows, it is unlikely the concurrency problem will be solved in the near term (Tlan and Martin 2009, 74). Therefore, integrated print and

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Use and Management of Electronic Books

Edited by Sue Polanka

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[www.alastore.ala.org](http://www.alastore.ala.org)

**SUE POLANKA** created the award-winning blog *No Shelf Required*, about the issues surrounding e-books for librarians and publishers. Polanka has been a reference and instruction librarian for over twenty years at public, state, and academic libraries in Ohio and Texas and is currently the head of reference and instruction at the Wright State University Libraries in Dayton, Ohio. She edited *No Shelf Required: E-books in Libraries* (ALA Editions, 2011) and *E-Reference Context and Discoverability in Libraries: Issues and Concepts* (IGI Publishing, 2012). She has served on *Booklist's* Reference Books Bulletin Editorial Board for over ten years, serving as chair from 2007 to 2010. Her column on electronic reference, "Off the Shelf," appears in *Booklist* quarterly. Sue was named a 2011 *Library Journal* Mover and Shaker.

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# CONTENTS

Acknowledgments	<i>vii</i>
Introduction	<i>ix</i>
<b>1 Going Digital but Not Bookless</b>	<b>1</b>
Physical, Digital Library Spaces	
Amelia Brunskill	
<b>2 Do E-books Bridge the Digital Divide?</b>	<b>17</b>
Sarah E. Twill	
<b>3 Accessibility Issues in E-books and E-book Readers</b>	<b>35</b>
Ken Petri	
<b>4 Making Sense of Change</b>	<b>61</b>
E-books, Access, and the Academic Library	
Lisa Carlucci Thomas	
<b>5 E-book Preservation</b>	<b>71</b>
Business and Content Challenges	
Amy Kirchhoff	
<b>6 Weeding E-books</b>	<b>93</b>
Alice Crosetto	
<b>7 What Is RDA, and Why Should E-book Managers Care?</b>	<b>103</b>
Steve Kelley	
<b>8 Enhanced E-books</b>	<b>115</b>
How Books Are Coming Alive in the Digital Environment	
Sylvia K. Miller	

<b>9</b>	<b>E-book Sea Change in Public Libraries Lending, Devices, Training, and Budgets</b>	<b>127</b>
	Michael Porter, Matt Weaver, and Bobbi Newman	
	<b>SPOTLIGHT: HARPERCOLLINS, OVERDRIVE, AND THE ALA <i>Reactions to Limits on E-book Access</i></b>	<b>145</b>
	Michael Porter	
<b>10</b>	<b>Libraries as Zones for Content Creation, Indie Publishing, and Print on Demand</b>	<b>155</b>
	Thomas A. Peters	
<b>11</b>	<b>Getting Control, Staying Relevant How Libraries Can Push the E-book Envelope to Their Advantage</b>	<b>171</b>
	Joseph Sanchez	
<b>12</b>	<b>The iPad Loaner Program at Oberlin College Library</b>	<b>183</b>
	Jessica Grim and Allison Gallaher	
<b>13</b>	<b>Leading and Learning Technology and E-book Adoption in School Libraries</b>	<b>195</b>
	Carolyn Foote	
<b>14</b>	<b>E-reader Adoption in the School Library Media Center A Journey of Collaboration and Discovery</b>	<b>207</b>
	Jennifer LaGarde and Christine James	
<b>15</b>	<b>Give Them Something to Talk About: The Kindle Pilot Program at the Unquiet Library</b>	<b>219</b>
	Buffy Hamilton	
<b>16</b>	<b>Using E-books with Reluctant Readers</b>	<b>231</b>
	Kathy Parker	

List of Contributors 239

Index 245

## INTRODUCTION

December 2010 was a major turning point for the e-book market. When e-reader prices dropped in preparation for the holidays, record numbers of devices were sold (Minzesheimer 2011). In fact, the demand for content was so intense that the Barnes & Noble servers crashed on Christmas Day (Carnoy 2010). This rising e-book trend charged into 2011 and thus far shows no sign of retreat. In March the Barnes & Noble Nook surpassed Amazon's Kindle in sales (Chan 2011), and the much awaited Apple iPad2 was also released. Amazon reached another milestone in April, announcing that digital book sales now exceeded sales of all print titles, both hardcover and paperback combined (Stevens 2011). But the surefire sign that e-books had reached the tipping point came in February when the Association of American Publishers declared—for the first time ever—that e-books ranked as the number one format among all categories of trade publishing (Sporkin 2011).

Many librarians predicted this growth trend and were prepared with downloadable e-book content and device lending programs. *Library Journal's* 2010 survey of e-book use in libraries found that 94 percent of academic, 72 percent of public, and 33 percent of school libraries had existing e-book collections (Polanka 2011). Device lending, while not as

widespread, was offered by 12 percent of academic, 5 percent of public, and 6 percent of school libraries (Polanka 2011). Preliminary reports of *Library Journal's* not-yet-released 2011 survey indicate 93 percent of libraries are experiencing an increased demand for e-books. Because e-books are now mainstream, libraries have adapted by offering new expanded digital content, device lending programs, and new services.

E-book content, devices, and services have created challenges for libraries as well as opportunities. Increasingly librarians find themselves being forced to deal with issues of licensing, digital rights management, and accessibility, plus device and format incompatibility. At the same time they are acknowledging and implementing new, innovative services in device use and lending, training, and support of self-publishing. *No Shelf Required 2* examines how libraries are using and managing e-books and e-reading devices. It expands well beyond the boundaries of the first volume, with sixteen completely new chapters from twenty new contributors. It includes contributions from academic, school, and public librarians; faculty; and vendors. The reader is invited to read the entire work or select chapters that stand on their own. Some important topics may be visited more than once, but in different contexts.

*No Shelf Required 2* begins with an examination of the digital library. Ameila Brunskill debates how new technologies have altered the relationship between libraries and their print collections and questions whether e-books are a true replacement for print. She presents the digital-but-not-bookless library through real-world examples from Cushing Academy in Ashburnham, Massachusetts; Stanford University Engineering Library; University of Texas at San Antonio Applied Engineering and Technology Library; and the University of Texas at Austin undergraduate library.

Chapters 2 through 7 spotlight different perspectives on e-book access. In chapter 2, social work professor Sarah Twill brings her nonlibrarian's perspective to e-books. Twill examines both the impact of household income and access to digital technologies on the adoption of electronic content and discusses implications for libraries. She discusses the case example method *Can the Jones Family Participate in Digital Technologies?* Twill encourages librarians and social service providers to collaborate in order to bridge the digital e-book divide.

In chapter 3, Ken Petri discusses e-book and e-book reader accessibility issues and the Americans with Disabilities Act. He looks at the costs

involved in converting print books into more accessible e-books, and the legal environment surrounding e-book accessibility. Petri examines various degrees of accessibility in e-book formats, devices, and software and provides strategies for publishers, libraries, and software and device makers on how to provide mainstream e-books accessible to all.

Chapter 4 explores access to e-books in the rapidly developing mobile environment. Lisa Carlucci Thomas discusses the impact of e-books and mobile devices on libraries, suggesting that libraries remain flexible as e-books continue to evolve. Thomas summarizes a research study on mobile access to e-books at Yale that found that 84 percent of their one million-book collection could be accessed on Apple iOS devices and 24 percent on dedicated e-reader devices.

Amy Kirchhoff asserts that perpetual access to e-books should not be ignored in chapter 5. Kirchhoff focuses on preservation requirements for permanent access to content along with specific challenges of preserving e-books, including digital rights management, legal issues, and the packaging of e-books.

In chapter 6, Alice Crosetto discusses weeding electronic content. She insists that e-books are long overdue for evaluation and weeding. Crosetto hypothesizes that e-books are not weeded because they do not occupy valuable shelf space. However, she cautions against ignoring this practice, citing out-of-date content and cluttering of the online catalog as concerns. She examines the similarities and differences of weeding print versus electronic books.

Chapter 7 completes the focus on e-book access with a discussion of resource description and access (RDA), the new cataloging code set to replace AACR2. Steve Kelley defines RDA for noncatalogers and describes how RDA provides a necessary foundation for building better data structures that will change the capabilities of future cataloging systems. RDA will provide future access to e-books through the online catalog. It will most likely provide the next step toward integrating library resources with the much heralded Semantic Web.

The publishing world is beginning to embrace enhanced e-books, those with multimedia features, internal and external links, or a combination of nontext features. In chapter 8, Sylvia Miller uses examples from the social sciences and humanities fields to explore the current landscape of enhanced e-books. She contemplates a future where enhanced formats are the norm.



Chapter 9 takes a more in-depth look at e-books in the public library environment. Michael Porter, Matt Weaver, and Bobbi Newman survey new developments in the use of e-readers in libraries, staff training for these new technologies, and budgeting for e-content. This chapter also includes a special report by Michael Porter, who provides a compelling look at the controversial HarperCollins decision to limit an e-book purchase to twenty-six circulations.

In chapter 10, Thomas Peters expands on the 2010 Chief Officers of State Library Agencies (COSLA) report about the future of public libraries. The report discusses seven areas of action; Peters's chapter focuses on the fifth action item: *help local authors and support self-publishing*. His chapter suggests that libraries should be zones for content creation, independent publishing, and print-on-demand services.

Joseph Sanchez insists in chapter 11 that libraries in this digital environment get control, stay relevant, and push the envelope to their advantage. He encourages libraries to develop their own content management systems to host local content rather than outsource access to large vendors. Sanchez shares his experience with such a project at Red Rocks Community College in Colorado, chronicling the progression of events that led to its decision to host e-book content locally.

Lending e-reading devices is a growing trend in libraries. In chapter 12, Jessica Grim and Allison Gallaher explain the planning and implementation of an iPad loaner program at the Oberlin College Library in Ohio. They describe pilot and full programs in detail, share assessment data, and explore future plans.

The final four chapters focus on e-book integration in school libraries and classrooms. Carolyn Foote begins in chapter 13 with an overview of the state of technology in the school library and its impact on leading and learning. She discusses the very real need for e-books and encourages librarians to take a leadership role adopting e-books in the school. Foote also foresees a myriad of obstacles as well as choices to be made along the way.

Three specific examples of e-book integration in school libraries and classrooms follow. First is from Jennifer LaGarde and Christine James in chapter 14. The librarian-teacher duo adopted Nook readers for a seventh-grade English classroom. The chapter chronicles their journey of collaboration and discovery, providing details on budgeting, connecting e-readers

to the curriculum, selecting devices and content, training students, and discussing lessons learned and possible future steps.

In chapter 15, Buffy Hamilton provides a detailed description of a Kindle pilot program at the Unquiet Library in Georgia. She shares her experience developing circulation procedures and purchasing content, offering best practices and recommendations for libraries who wish to adopt similar programs. Hamilton shares student responses to the program and anticipates its future direction.

Kathy Parker documents the success of an e-reader pilot program in a rural Illinois school system in chapter 16. This program implemented eighteen Kindle 2 devices with second-grade reluctant readers. She gives details of the program planning, implementation, student selection, assessment, and best practices.

Though this book was written in the first half of 2011, every effort was made to ensure the accuracy of its content. But because the e-book playing field is constantly changing, any predictions are, at best, tenuous. Using and managing e-books and e-readers in any setting is challenging to say the least, much like chasing a moving target. Librarians must be resilient, for as the pace of change continues to quicken, they need to manage—and not be managed by—e-books and their progenies.

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# 9

## **E-book Sea Change in Public Libraries**

### **Lending, Devices, Training, and Budgets**

MICHAEL PORTER, MATT WEAVER,  
AND BOBBI NEWMAN

After Christmas it hit like a storm.

*Lori Reed (2011)*

**T**he situation for e-books in public libraries changed radically at the beginning of 2011. For many gift givers, the e-reader was simply the cool gift to give and to receive. It was a fresh, new kind of gift for many, and with its wide market penetration and media buzz it became an easy choice for those who could afford to give it in the 2010 holiday season. In the last week of December 2010 alone, some three to five million e-readers were activated (Minzesheimer and Memmott 2011), and as a direct result public libraries experienced a substantial jump in e-book use.

Understandably, libraries like the Charlotte Mecklenburg Library reported new patron use of OverDrive rose 160 percent from the previous year, while at the same time digital content circulations increased 399 percent and holds on digital content spiked up 178 percent (Reed 2011).

The Stark County District Library in Ohio experienced similar changes, reporting that in the first nine weeks of 2011, 1,050 e-books were borrowed. This is almost as much as the entire total for all of 2009. E-book checkouts there are now expected to exceed 6,000, which is a more than a 100 percent increase from 2010 (Biliczky 2011). While this is a new

jump in e-book and e-reader activity, in the coming years and decades these numbers are expected to continue to rise at startling rates across nearly all the communities that libraries serve, raising a host of challenges, opportunities, and new realities.

So while libraries clearly find themselves in the wake of an explosion in e-book use, there are significant challenges. Libraries share parts of an industry that has seen multiple format and standards changes and adjustments, marketing campaigns galore, a Borders bankruptcy, the imposition of lending restrictions on e-books by HarperCollins (see the spotlight essay by Michael Porter following this chapter for more information on the HarperCollins lending restrictions), and even the announcement that the Kindle will be able to use OverDrive e-books. Considering the trends and all the significant changes that abound, it becomes clear that new lending paradigms and solutions are needed for libraries. And while some changes have been announced and implemented, libraries must become more and more informed and engaged when it comes to e-books. The solutions that are being developed in this turbulent era for libraries and e-book access must include the understanding and expertise of libraries and library staff, and the ultimate solutions must result in furthering the mission of public libraries both in the short and long term.

With new entrants in the library e-book sector and major advances from current players, assessing what is on the market can be a challenge on its own. This chapter will help public libraries make decisions about e-book services by exploring these key areas: new developments in e-book services to libraries, e-readers in libraries, training, budgets, and the HarperCollins/OverDrive situation.

## **E-BOOK PROVIDERS: NEW PLAYERS, MAJOR DEVELOPMENTS**

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Over the past few months, the sector has changed rapidly, and further changes are likely in the near future. As markets and players in those markets shake out, being familiar with the myriad issues will help libraries uncover, find, and even create better deals and systems for e-book and e-reader use. There have been a number of developments in 2011 of interest to public libraries.

Currently, OverDrive remains the strongest player in the public library e-book market, having made many technological advances in recent months, including launching mobile apps for Apple's iOS, Droid, Windows Mobile, and BlackBerry. While those apps have added functionality and reduce the reliance on Adobe Content Server, the company's biggest advance was a deal that will allow Amazon's Kindle e-reader, and Kindle apps, to use OverDrive e-books. A major gap in OverDrive's services was the ability to provide e-books to the most popular e-reader on the market. What's more, the deal will not require the library to allocate additional dollars for yet another e-book format or to add the Kindle to their offerings (Estrovich 2011). That is not to say the addition of the Kindle will not represent increased costs: when the service goes live, a new group of e-book readers will draw on collections that have the restrictions of OverDrive's one-user/one-checkout e-book lending model. With that will come further pressure to acquire more copies of e-book titles.

Another development at OverDrive is its work on an e-reader certification program, which was a recommendation of the Chief Officers of State Library Agencies (COSLA) report on e-books (2010). COSLA wanted the company to indicate which devices were compatible with library e-book services. According to David Burleigh, OverDrive's director of marketing, the company developed specifications for e-readers after consulting libraries with a view to designing and manufacturing devices that libraries would acquire and lend. OverDrive took the specifications to devices manufacturers in China. But the certification program has been delayed by a couple of changes in the technologies involved in delivering e-books to patrons. First, a new version of Adobe Content Server (ACS)—the system that handles the digital rights management for e-books in OverDrive's system—is pending. ACS, long criticized by users and librarians alike for the complications it adds to the e-book lending process, is expected to undergo improvements that will benefit libraries and their patrons. Second, OverDrive's own apps have significantly increased device compatibility with library e-books. The program is still developing, but when it is announced it may not reflect the original goal. The company's main objective is to improve user experience.

Plans to launch a cloud-based e-book lending system were announced by 3M Library Systems at the ALA Annual Conference in June 2011. The service includes touch screen devices for within libraries, special e-reader apps for mobile devices, and its own e-readers (Toor 2011).

The e-book collections of NetLibrary, acquired by EBSCO in 2010, were migrated into the EBSCOhost database platform in 2011 so that e-books could be searched along with other content. The some 300,000 e-books and audiobooks will be expanded as EBSCO adds the EPUB format later in 2011 (Kelley 2011).

OCLC and Ingram have partnered to offer e-books that will feature short-term loans made through the latter's MyiLibrary e-book collection. The loan term under this new service will be a maximum of nine days. WorldCat Resource Sharing interlibrary loan fee management will handle the fee, which will amount to 15 percent of Ingram's price. Users will have immediate access to titles when they request them (OCLC 2011).

Academic e-book specialist ebrary's offerings have evolved with the launch of short-term loans that are initiated by use. This program—separate from but combinable with its patron-driven acquisition program—will have loan terms of either one day or one week. Depending on agreements between ebrary and publishers, the cost to the library of such a loan will range from 10 to 30 percent of the cost of the title (Rapp 2011B).

After three of these short-term loans, the library will be required to acquire the title for further use. In addition to its long-standing presence in the academic market, ebrary has broadened into the public library market (Hadro 2010; Rapp 2011B). Ebrary's public library offerings include a simultaneous access offering in stark contrast to the one-copy/one-user model offered by OverDrive.

Another new approach to e-book lending in public libraries has been launched by the Internet Archive. Like the Sony Reader program, the Internet Archive's e-book program is restricted to a select number of participants. The program will offer some 85,000 e-books that had been digitized and donated by libraries for in-library loans as part of its Open Library service. Initially, only libraries who contributed e-books to Open Library will have access to the collections (Rapp 2011A).

The Open Library project will include donated content from indie publishers like Smashwords, Cursor, and OR Books, according to Internet Archive founder Brewster Kahle and director Peter Brantley (Kahle 2011). Titles will be license free. Patrons will be able to download up to five titles at once, which they can have for a maximum of two weeks. Books can be read outside the library after they have been checked out. These collections can be downloaded as PDF or EPUB e-books, or viewed in a browser-based

reader called BookReader developed by Internet Archive. Included in the Open Library project e-books are titles that are out of print but otherwise still subject to copyright.

## **E-READERS IN PUBLIC LIBRARIES**

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E-reader lending programs in public libraries have had a slow and cautious start. A survey of public libraries by *Library Journal* in 2010 found that only 5 percent of public libraries were lending e-readers, but 24 percent were considering it (*Library Journal* 2010). Examining what libraries are currently doing when it comes to e-reader lending gives insight into the nature of the market and the ways e-reader and e-book lending seem to be evolving. It also provides a useful backdrop for working for more cohesive, library-centric systems that increase efficiency and efficacy of e-book technologies while creating a substantial connection across libraries. So, how have public libraries responded to the popularity of e-books and e-readers? Some libraries offer downloadable e-books through an aggregator like OverDrive or eBooks on EBSCOhost. This allows the opportunity for patrons to download books to their personal devices but does not require the library to invest in e-readers. A second option is to acquire e-readers, load them with e-books, and loan them directly to patrons. In this context the e-reader constitutes a service, a collection, and a tool for technological instruction, with particular considerations in each aspect. A third option is to offer a “gadget zoo” or “petting zoo.” In this example a variety of devices and other current technological gadgets are placed on display for patrons to sample. These items may not be available for borrowing but rather as an educational opportunity. Often libraries bring in staff from a local electronics store who can demonstrate multiple devices of a given type.

## **LEGAL ISSUES**

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Perhaps one of the reasons for the low number of e-reader lending programs in libraries is the legality of offering the service. Looking at the terms of use of both the Barnes & Noble Nook and the Amazon Kindle, nowhere is library use addressed. So the legality of lending e-readers is



simply unclear. Libraries that choose to circulate e-readers enter uncertain territory. E-reader lending is not mentioned in the terms of service for the Kindle either, and differing responses from Amazon employees have been noted. An Amazon staff member told the Howe Library in Hanover, New Hampshire, that lending Kindles was permitted, but Amazon spokesman Drew Herdener has stated to *Library Journal* that it is not permitted (Odor 2009).

Peter Hirtle argues that based on Amazon's terms of use for the Kindle, which says that the software on the Kindle cannot be lent, libraries cannot and must be wary of pursuing such a service. He recommends that any such lending program be done with the input of an attorney (Hirtle 2010).

To this point, none of the producers of e-readers have endorsed or prohibited lending of their devices and e-book content by libraries. Publishers, whose content is being lent on these devices, have been silent on the specific nature of e-reader lending in libraries.

While BYU decided to scrap an e-reader lending program when they could not get the company's assent in writing (Haddock 2009), other libraries are taking the risk in order to best serve their patrons.

## **NOOK E-READER LENDING AT MENTOR PUBLIC LIBRARY**

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The Mentor Public Library (MPL) began circulating Nook e-readers in 2010. The collection began with four readers gradually increasing to twelve due to popularity. According to David Newyear, adult information services manager at MPL, initial demand was significant, with each Nook having twenty to thirty holds at one time. Once the library increased the number of Nooks to twelve, they found one or two available on the shelf at any given time. In the first year of the program, the Nooks circulated a total of 214 times.

## **PLANNING THE E-READER COLLECTION**

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When MPL began considering developing an e-reader lending service, there were many decisions to make, not least which e-reader to offer.

They considered the Nook and the Kindle, based on consumer reviews recommending the devices highly. Several factors led them to choose the Nook, including:

- *Licensing.* Nooks allow one copy of a book to exist on six Nooks at a time, versus one copy per Kindle at that point in time. Currently, there can be up to six Kindles associated with the e-book titles on one account (Amazon n.d.). The ability to share a \$9.99 title across six readers is a cost savings for libraries.
- *Legality.* At the time, Amazon was facing a potential lawsuit over the text-to-speech functionality from publishers.
- *Partnership.* MPL tries to build partnerships whenever possible. The local Barnes & Noble bookstore, with whom they had an established relationship, provided them access to staff members' expertise with the devices.

MPL did not consult with an attorney, as Hirtle suggests, but dealt directly with Barnes & Noble (and Amazon, when it was considering the Kindle) staff, making clear their intent to lend the devices to patrons. Representatives from Barnes & Noble aided in training library staff on the Nooks. Having received no prohibitions from either company, and after looking closely at the policies of other libraries that were loaning e-readers, MPL moved forward with the program.

Despite the partnership with the local Barnes & Noble, MPL was not able to get a discount for buying multiple units. At Amazon for a discount to kick in, they would have had to buy fifty units.

After deciding on the device, MPL needed to set policies and determine how the e-reader collection would fit in the library's workflow. An important consideration in the development of the service was the intent to make managing this collection as easy on frontline staff as possible. Equally important was protecting these expensive devices throughout their journeys from library to home and back again. Library staff looked at other libraries that were circulating e-readers in order to learn the best approach, as well as those libraries' policies. Ultimately, they decided to put the same fifty titles, mostly best-selling fiction and nonfiction, on their Nooks.

## HOUSING THE COLLECTION

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The MPL Nooks are on display behind the circulation desk, keeping them safe from theft, where they are electronically charged upon return. This arrangement requires as little management of the devices by staff as possible.

When a patron takes out a Nook, she receives the e-reader, a quick-start reference guide, and a charger. To protect the device, MPL found that a plastic case designed to store handguns was the perfect fit and offered excellent protection. That said, a “no-brainer policy” was that the devices cannot be returned in the drop box.

## POLICIES

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The MPL policies for the collection needed to protect the devices and their content. The exact prices of the items in the package are itemized so the patron knows precisely what they are responsible for, including the warranty for the device, the cost of the charger, the case, and so on. Devices are locked down: patrons can neither add nor remove e-books.

Every Nook transaction requires the patron to go through a simple checklist to ensure that the device leaves and returns in working order and in its complete package. At checkout, the patron must complete an electronic device agreement, which states, “I agree to accept full responsibility for the Electronic Device while it is checked out to me.” Specific terms are spelled out, such as:

- I will not tamper with the Electronic Device, accessories, and digital books, attempt to load digital books, or attach any equipment not designed for use with the Electronic Device.
- I agree to pay all costs associated with damage to, loss of, or theft of the Electronic Device while it is checked out to me (\$333.85 plus accrued late return fees for the Nook e-reader).
- I agree the library may use any appropriate means to collect the amount owed for fees, damage, loss, or theft of the Electronic Device and that my record will be submitted to collections within 30 days.

The process of checkout/return takes between two and three minutes. It was designed to be as short as possible, yet to make sure that the device transitions between institution and patron and back with a clear understanding of responsibility. Forms were designed to be simple to fill out, while clearly communicating the patron's responsibility for the device when it is in his possession.

Newyear said that the Nooks generated a good return on investment. At the time of the interview, MPL did not offer OverDrive e-books but will have added them in May 2011.

Because of the Nook collection, at least some of the library's customers and staff members will have gained some expertise with e-readers.

## THE SONY READER LIBRARY PROGRAM

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In 2010, Sony launched the Reader Library Program in order to ensure that library staff would be well trained in the use of its line of Readers and be capable in assisting library patrons. The program is available to libraries who offer OverDrive e-books, but they must fill out an application on the program's website to enroll. The program includes, as of the latest application, a two- to three-hour training session led by Sony staff, three Readers for use and display, a floor stand, access to online web training and materials, and brochures and bookmarks.

The Mark & Emily Turner Public Library (M&E) in Presque Isle, Maine, was among the first group of participating libraries that was announced in September 2010. They received four e-readers—two Pocket and two Touch models—and stands on which they can display one of each type of e-reader.

Two of the e-readers are tethered to the library's Sony. Two others, while not bar-coded like other library materials that circulate, can be checked out the same way that noncirculation reference materials can be checked out for special loans. The focus for these circulations of e-readers is educational so patrons can learn how the devices work, particularly those who are considering buying one.

The quality of the training that Sony provides is high, according to Lisa Neal Shaw, a reference librarian at the M&E library, as it offered staff the opportunity to "test-drive" Sony Readers and learn everything they needed to know. This experience with the devices has made troubleshooting device questions for patrons, either in person or over the phone, substantially

easier. The company has kept in touch. Shaw said, “They didn’t just send us some Readers and then disappear; they really seemed to want to make the program work for library patrons” (personal communication, 2011).

Shaw said that the program “has truly exceeded [her] expectations” and that Sony’s representatives were genuinely interested not only in her library but the direction of libraries in general. As a result, there was a strong sense of commitment to the library’s mission.

## **TRY BEFORE YOU BUY**

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At both MPL and M&E, having e-readers in the library were of benefit to patrons because they could familiarize themselves with the technology before acquiring it. MPL has several Nooks; M&E also has a Kindle and a NookColor that patrons can check out as special items, like the Sony Readers. At both libraries, patrons have access to the iPad tablet.

Lending e-readers specifically so patrons can experiment and learn—rather than for access to content—is a service that has value for patrons who intend to acquire their own devices. A full-fledged e-reader lending program provides some increased access to materials for those who cannot afford an e-reader, in addition to do-it-yourself, hands-on training.

Some independent publishers and authors have gone e-book only, like mass romance publisher Dorchester Publishing, which no longer publishes its books but prints on demand to augment its e-book model (Milliot 2010). With more content available only to readers who have e-readers, a lending program that provides only limited titles on those devices cannot provide broad access to those who cannot afford them. A lending program that allows the patron to borrow an e-reader and select the titles to upload would be a major advance in this area.

## **TRAINING STAFF AND PATRONS ON E-BOOKS AND E-READERS**

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As we have seen, the deluge of e-readers as holiday gifts created a lot of interest and opportunity for libraries in early 2011. In addition to challenges with increasing collections came the challenge of instruction and

learning. Many library patrons received their e-reader as a holiday gift whose giver was assured by a well-meaning store clerk that the e-reader model did work with library books. Unfortunately, these assurances didn't come with any instructions, and as a result patrons turned to their local library staff for answers.

Some libraries were fortunate to have the staff, funding, and foresight to prepare for the holiday boom by rolling out training in the form of videos, handouts, and glossaries, as well as being able to provide a “genius bar”-type, hands-on experience for library patrons (Circle 2010). This multifaceted training approach for both staff and patrons is a best-case scenario and surmounts the challenges that many other libraries face.

## CHALLENGES TO TRAINING

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Many library systems found themselves unable to prepare for the holiday e-reader onslaught due to challenges out of their hands. The most common challenges are:

- *Staffing.* In the current economic climate many library systems are short staffed, which means just making the time for training can be a challenge.
- *Access to devices.* Many libraries do not have the ability to buy all the e-readers on the market. Even in situations where a library was able to get one or two devices, not all brands or models could be purchased. There is also the stress of knowing that the device(s) you choose will most likely be replaced by a newer model in a year.

Not having access to the devices provides the unique challenge of learning to use a device you have never seen. Fortunately, many libraries and library groups, like the Westlake Porter Public Library ([www.westlakelibrary.org/?q=taxonomy/term/571](http://www.westlakelibrary.org/?q=taxonomy/term/571)) and Maryland's Digital Library eLibrary Consortium ([maryland.lib.OverDrive.com/4C8B0D69-EEDC-4A0B-94A9-2D95A8DF4194/10/336/en/Help.htm](http://maryland.lib.OverDrive.com/4C8B0D69-EEDC-4A0B-94A9-2D95A8DF4194/10/336/en/Help.htm) and [www.youtube.com/user/alleganycountylibrar](http://www.youtube.com/user/alleganycountylibrar)) are producing pages, FAQs, and even videos on how library users can use e-readers and get e-books

from the library. Many libraries are going so far as to produce web pages and multimedia to address the common “what e-reader should I buy?” question. Others take patrons step-by-step through the process of downloading e-books onto e-readers or tablets, from installing Adobe Digital Editions or other software, to deleting e-books from devices after the borrowing period has expired. In the case of libraries’ OverDrive services, which include an interface that can be customized for the library, library-specific instructions eliminate the need for patrons to interpret generalized instructions.

Many library systems do not have a dedicated trainer on board. In many situations it is still common that e-reader and e-book training falls on the young or tech-savvy staff members who in truth may not be all that familiar with e-readers. Even in systems with a dedicated training department, the staff may not be familiar with e-book and e-reader technology.

In any case, even though knowing where to start can be daunting, progress is being made. In interviews with trainers about the e-book and e-reader training programs at their libraries, several themes, methods, and efficiencies stood out. The following interviews give a solid sense for the practical realities of training staff and patrons how to use e-books and e-readers as part of their library work and use. From confusion to resentment of technological, logistical, time, and cost issues, these trainers are representative of the current reality in e-reader and e-book training in public libraries today.

## **A LIBRARY SYSTEM WITH A DEDICATED TRAINER**

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Beth Tribe, IT instructor and specialist at Howard County (Maryland) Library System, is responsible for training staff on e-books and e-readers, but she aims to get more staff to participate in training customers. Training on Nooks, which the library circulates, began with customer service supervisors and “tech squads” at the system’s branches. These squads are comprised of tech-savvy and customer service staff. In subsequent rounds of training the rest of the staff received training. Tribe is working on a training program for all staff that will cover all the e-readers that they have in their stable: Nook, NookColor, Kindle, Kobo, Sony Reader, iPad, Android tablet, and Pandigital. Until the library acquired its own Nooks,

staff—despite having taken OverDrive’s training—had not had direct experience with e-readers.

Tribe has conducted training classes for the public that taught the differences between dedicated e-readers and e-reader apps on tablets, smartphones, and the like and a series of device-specific classes called “Are You Ready?” The next phase of the training is to create screencasts of OverDrive-related classes and short videos of the particular e-readers that will be available via the library’s website.

According to Tribe, e-book/e-reader training is no different from any other, in that the largest obstacle in getting staff trained is managing employees’ schedules. Despite the staff’s interest in these technologies, getting people to free up time to learn is always hard. To make sure training is most effective, focus on these key areas:

- *Devices.* Having a stable of devices is a great resource for a library, but not everyone has the money for that. The Howard County Library System got money from some e-readers from a state grant and paid for others from its budget. If your library can only acquire a few, buy the most popular ones: the Nook, the Kindle, and the iPad. Tribe says the Kobo is also popular among patrons. Libraries cannot be expected to know every device.
- *Vendor offerings.* If a library cannot acquire devices, focus training initiatives on content from vendors like OverDrive, or free sources of e-books like Project Gutenberg and the free offerings from Google Books.
- *Best practices.* Training should explain the easiest way to accomplish tasks, and file formats. The differences between EPUB and PDF formats, for instance, are nuanced in some cases: OverDrive EPUB e-books can be returned early by patrons, while PDF e-books cannot.

## TRAINING WITHOUT A DEDICATED TRAINER

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In the absence of a dedicated trainer, Daniel Messer, circulation supervisor for the Queen Creek (Arizona) Library, a branch of the Maricopa County



(Phoenix) Library District, said that various staff have stepped up to help out with e-books and e-readers at his library. Brianna King, at the North Valley Regional Branch, produced handouts on each of the major e-readers designed to facilitate their use with the library's digital collection (<http://maricopa.lib.OverDrive.com/>). Messer himself, a renowned computer "geek," takes troubleshooting and assistance calls "from customers all over the Valley of the Sun."

All staff have had the chance to get trained on e-books and e-readers, but not all have done so. King did a demonstration at the library's staff training day that included a breakout session on the Nook featuring a Barnes & Noble representative. At his branch, Messer estimates that more than half of the staff have received some training on e-readers. Many staff, who otherwise are well versed in e-book services, will defer to those with more expertise with the devices if an e-reader "just doesn't work." Messer says that at this point "select staff" have received training but elaborates that training is available to everyone because "we're all going to deal with these devices more and more as time goes on."

For Messer, the goal of training is to foster familiarity with the devices, not make people into experts. Staff training has largely been done in classes led by Messer and King. Messer has also conducted one-on-one training sessions with staff. Of great benefit was the e-book conference seminar at the Arizona State Library, where every attendee received an e-reader bundle to keep and take back to their library. Messer's branch received an iPad, a Kindle, and a Kobo, and other libraries received Nooks and other devices. The bundles were comprised of devices and gift cards so branches could buy e-books and apps for their devices.

Messer says a major variable in a training program's success is the individual's attitude toward technology. Those who are excited about new technologies are eager to explore not only the device but how it can help the library. Others acknowledge the arrival of e-readers as part of the library of today, but they don't own one or see a need for it. Some reject the very concept of the e-reader. Some negative attitudes have been tempered by the massive success of e-readers. Working with these attitudes is important. Messer says, "You may not change their mind about what the device means, but you're certainly going to have to teach them what the device is."

Another variable is the staff members' capability or comfort with technology. At the library, there is a wide range of skills, from "geek" to

novice. Other challenges lie in a person's technological abilities. Some staff may have a great attitude toward learning new technologies but lack fundamental knowledge for even basic operation of devices.

Access to devices and distance between branches are other major challenges in training staff. Having to troubleshoot patrons' device-specific problems over the phone is problematic because libraries don't have access to every device on the market. Not having the device in his hands, Messer says, makes such customer service interactions very challenging.

As for distance, where branches are up to two-hour drives apart, "sometimes, the biggest problem is just finding a day when someone can cut six hours from their workday (two hours driving there, two hours of training, two hours driving back) so they can learn."

## MONEY AND CHANGE

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Unfortunately, the increased demand for e-books and e-readers comes to institutions that are more often than not operating under the tightest of budgets, with little or no room for new expenditures. In the face of critical, traditional library services, the money to pay for these new resources and their support is difficult, if not impossible, to come by. According to a report on library spending priorities, "37% of public libraries increased their budgets in 2010 and 30% expect an increase in fiscal 2011. Conversely, while 43% reported budget decreases between 2009 and 2010, the number anticipating a decrease is projected to decline to 32% for fiscal 2011" (McKendrick 2011, 5). The report also notes that "increases are coming on the heels of years of soft budgets, and the increases being reported are not necessarily enough to keep the libraries operating at levels constant with inflation" (3). Some libraries have found money to expand their e-book collections, but this is not the rule, and most e-reader purchases often come at the expense of other library services or resources. As a result, holds lists for e-book titles have grown, sometimes dramatically.

This is complicated by the fact that we are in a time when our library patrons have quite high expectations. These expectations are driven by both our excellent past performance and the quality of service many (who can afford it) have come to expect from commercial e-book and e-reader services. Given these factors it is easy to see how the increased delay in

access to library content threatens to undermine libraries' efforts to remain relevant in the e-book era. This does not yet touch on the challenges many users face in accessing e-book content once the library has built e-books into the collection.

Regardless of how the details in the e-book and e-reader market shift, several things are clear to libraries. First, the market, service providers, and products are in a state of rapid flux and rapid growth. Second, libraries are doing all they can to respond appropriately given their budgetary restraints. Third, as library users migrate to electronic format(s), libraries will need to be vigilant, thoughtful, and bold in adopting new solutions, ideas, and methods of service provision. With great change comes the difficulty of changing. Priorities and resource allocations will likely need to shift, potentially in very significant ways. We can see that libraries are responding and doing their best to serve their communities in a world where e-books are a relevant service offering.

After looking at the landscape and the response of those working in libraries, the largest questions now seem to be: How far will this all go? What role will libraries serve in the "new normal" of massive e-book circulation? And how will we fund this evolution in libraries and content consumption while still fulfilling our mission as community institutions? Libraries must grapple with these questions and their solutions in order to find their place in this dynamic e-book environment.

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## HarperCollins, OverDrive, and the ALA: Reactions to Limits on E-Book Access

MICHAEL PORTER

If OverDrive's Kindle deal could be overshadowed by anything, it came in the form of an e-mail from Steve Potash to "OverDrive Library Partners" sent February 24, 2011. Tucked a few screens down, wrapped in language that seemed carefully designed to soften the impending blow and shield the company from negative backlash, was a warning about major coming changes to e-book circulation in libraries from a major publisher and OverDrive partners:

The past several months have brought about dramatic changes for the print and eBook publishing and retail industries. Digital book sales are now a significant percentage of all publisher and author revenue. As a result several trade publishers are re-evaluating eBook licensing terms for library lending services. Publishers are expressing concern and debating their digital future where a single eBook license to a library may never expire, never wear out, and never need replacement.

OverDrive is advocating on behalf of your readers to have access to the widest catalog of the best copyrighted, premium materials, and lending options. To provide you with the best options, we have been required to accept and accommodate new terms for eBook lending as established by certain publishers. Next week, OverDrive will communicate a licensing change from a publisher that, while still operating under the one-copy/one-user model, will include a checkout limit for each eBook licensed. Under this publisher's requirement, for every new eBook licensed, the library (and the OverDrive platform) will make the eBook available to one customer at a time until the total number of permitted checkouts is reached. This eBook lending condition will be required of all eBook vendors or distributors offering this publisher's titles for library lending (not just OverDrive) (Potash 2011).

Just days later, as warned, OverDrive announced that the publisher HarperCollins would be limiting library circulations on the e-books they publish and sell access to. The new rules for libraries boiled down to this: after twenty-six circulations of an e-book, the item would simply disappear

from the library's digital collection. If the library wanted or needed to circulate the item again they would have to repurchase the right to do so for another twenty-six circulations.\*

The reaction to the HarperCollins announcement caused shock waves, not just in the library industry but for many dedicated library users as well. Hundreds of blog posts, newspaper and magazine articles, and radio and television spots all talked about the issue. Clearly this did not paint a favorable picture of HarperCollins in many people's minds. Yet at the same time it served as a teachable moment for libraries. As many people associated e-books with the Kindle in recent years, libraries were also clearly in people's minds when it came to e-books. After watching the spectacle of the HarperCollins/Overdrive announcement (referred to as #hcod on Twitter) unfold, it became very clear that people want to borrow e-books from libraries—and they want to make sure their libraries can permanently access them at an affordable price.

When considering #hcod, though, there certainly are many factors at play. At the root of the problem is that libraries and publishers have different priorities. Libraries are critical to the health of a community because they provide ongoing access to materials. Particularly in this economy, budgets are tight; libraries can't afford to purchase the same e-book twice. Publishers, in turn, are concerned about revenues and ensuring their business remains liquid. These issues come at a time when, for example, the music publishing industry is reeling and shifting in massive ways, with major players simply going out of business. So it is understandable that things will get shaken up and evolve in the coming years. It is also reasonable to expect that as this happens, publishers will experiment with business models as they struggle to ensure their business remains liquid. Libraries must remain vigilant during this time, protecting their investments and access to digital content.

To a majority of observers—particularly the vocal observers—the decision to limit circulations of e-books and then require additional purchases was seen as unnecessary. To some it even seemed to display a lack

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\* We will touch on the backlash to this announcement next, but in writing this chapter it was discovered that some blog posts announcing these changes on both the OverDrive and the HarperCollins *Library Love Fest* blog appear to have been removed. At the time of this writing, the twenty-six-circulations rule for e-books from HarperCollins still exists, but some of the initial announcements via these respective blogs—posts that contained a massive amount of outcry and negative response—no longer appear to be available on their respective blog sites.

of understanding and care for libraries and library services. To others still it simply read as greedy.

Many in the library world, most often privately, were calling for calm. The argument was made in some circles that because some of the major publishing houses in the United States did not currently allow libraries to access and circulate their titles in e-book format, we should not lash out, even as individuals, against these changes by HarperCollins. “Dare we alienate a major publisher by taking them to task for something that an individual had personally perceived as shortsighted or worse? Can libraries afford to lose the ability to circulate e-books from major publishers given the trends in increasing e-book purchases?” In the wake of #hcod, these questions were asked in many quiet meetings and conversations around the country between library leaders and staff alike in the spring of 2011.

Wherever the observer found themselves on the issues, it was clear to most folks in Libraryland that what had become known to many as “#hcod” was a scandal that had captured imaginations and the attention of the profession and the national media alike. ■

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## HarperCollins *Library Love Fest* Blog

*March 1, 2011, post*

[http://harperlibrary.typepad.com/my\\_weblog/2011/03/open-letter-to-librarians.html](http://harperlibrary.typepad.com/my_weblog/2011/03/open-letter-to-librarians.html)

*135 comments on May 24, 2011*

We are striving to find the best model for all parties. Guiding our decisions is our goal to make sure that all of our sales channels, in both print and digital formats, remain viable, not just today but in the future. Ensuring broad distribution through booksellers and libraries provides the greatest choice for readers and the greatest opportunity for authors' books to be discovered.

Our prior e-book policy for libraries dates back almost 10 years to a time when the number of e-readers was too small to measure. It is projected that the installed base of e-reading devices domestically will reach nearly 40 million this year. We have serious concerns that our previous e-book policy, selling e-books to libraries in perpetuity, if left unchanged, would undermine the emerging e-book eco-system, hurt the growing e-book channel, place additional pressure on physical bookstores, and in the end lead to a decrease in book sales and royalties paid to authors. We are looking to balance the mission and needs of libraries and their



patrons with those of authors and booksellers, so that the library channel can thrive alongside the growing e-book retail channel.

We spent many months examining the issues before making this change. We talked to agents and distributors, had discussions with librarians, and participated in the Library Journal e-book Summit and other conferences. Twenty-six circulations can provide a year of availability for titles with the highest demand, and much longer for other titles and core backlist. If a library decides to repurchase an e-book later in the book's life, the price will be significantly lower as it will be pegged to a paperback price point. Our hope is to make the cost per circulation for e-books less than that of the corresponding physical book. In fact, the digital list price is generally 20% lower than the print version, and sold to distributors at a discount.

We invite libraries and library distributors to partner with us as we move forward with these new policies. We look forward to ongoing discussions about changes in this space and will continue to look to collaborate on mutually beneficial opportunities.

To continue the discussion please email [library.ebook@HarperCollins.com](mailto:library.ebook@HarperCollins.com).

Sincerely,

Josh Marwell

President of Sales

HarperCollinsPublishers

(Marwell 2011)

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## **Actions from Libraryland in Response to #hcod**

As the issue began to unfold in the library press and commercial media, many looked to the American Library Association for a statement and leadership. To some the response of the organization was slower than they wanted or expected. To explain this, ALA President Roberta Stevens released a letter to the membership, saying:

First and foremost, I want to thank you for your patience. I held back on a public statement on the recent decision by HarperCollins to restrict the lending of e-books until the Equitable Access to Electronic Informa-

tion Task Force (EQUACC) met last week. Please know that I heard your voices of concern about the impact of additional costs on your libraries and ability to meet the needs of the communities you serve . . .

As an outgrowth of EQUACC's working retreat, a website will be launched within the next week. The site will allow you to provide your comments and ideas. The site's availability will be announced using the many ways we have within the association to "get the word out." (Price 2011)

This statement certainly generated interest in ALA's fledgling Task Force on Equitable Access to Electronic Information (EQUACC), which conveniently happened to be meeting for their first retreat at the Washington, D.C., offices of ALA the week following the break of the #hcod story. Given that this meeting had been in the planning stages for months and the task force members announced only in December 2010, there certainly was much work to be done. Issues related to #hcod were high on the group's list of conversations before, during, and following the retreat.

EQUACC also set up a website with a blog and forums about #hcod and any issues related to electronic content access and the future of libraries. These measured and more traditional approaches, however, did not satisfy some, who looked to ALA for a different kind of leadership on the issue. And this reaction resulted in several interesting, organized responses.

Among the hundreds of bloggers posting about #hcod, a petition started by librarian Andy Woodworth saw massive participation. By late May 2011 the petition had roughly 70,000 signatures and had garnered further national and international attention on the specific HarperCollins decision as well as larger issues around e-book circulation and access for and through libraries. The points made in the text of the petition clearly strike a chord with many. Regardless of the position a person takes on the issues, it is a worthwhile read:

On March 7, 2011, the publisher HarperCollins instituted an expiration policy on eBooks that are licensed to libraries. Under this new arrangement, eBooks would "self-destruct" after being checked out 26 times. This would require libraries to re-purchase the eBook if they wanted to continue to make it available. Libraries across the country

are boycotting future purchases of HarperCollins eBooks, but our voices alone will not change their policy. **We need your help.**

As Cory Doctorow wrote, “the durability of eBook is a feature, not a bug.” To place a cap on the circulation of eBooks in order to “simulate” the wear and tear of a physical book is not only insulting to readers, but this video shows how easily it can be proven wrong with physical books.

The significant advantage of eBooks for libraries is that it allows people to borrow books from home and read them on their computer or e-reader. When the book is due to be “returned” to the library, the file is rendered inert and the next library user can check out the eBook. Limiting a book to 26 total checkouts means that it could be there one day and gone the next, leaving that 27th borrower in limbo as the library assesses whether to re-purchase the eBook. **If left in place, this policy would threaten public access to eBooks by making them disappear from the virtual shelf.**

Please join us in voicing your opposition to this policy of self-destructing eBooks.

To see if libraries are still boycotting HarperCollins, you can visit the website [Boycott HarperCollins](#) (Woodworth 2011).

Interestingly, the [Boycott HarperCollins](http://boycottharpercollins.com/) web page (<http://boycottharpercollins.com/>) referenced at the end of the petition contains a link to a *Library Journal* article that actually names dozens of libraries who took action in response to #hcod. Some of these responses were quite strong, moving the idea of a boycott from an individual statement to a more substantial, actionable decision. Hundreds of libraries from Kansas to New York, Iowa to Texas, Missouri, and Illinois all took formal steps to refrain from purchasing any new e-book content from HarperCollins as long as these new restrictions were being applied. While most were refusing to purchase HarperCollins e-books, others went so far as to refuse to continue purchasing audiobooks and in some occasions even print books from the publisher (Kelley 2011).

Many speculate that this has meant a cut into the business not just of HarperCollins but to OverDrive as well. This may be a logical conclusion, for at the time of the announced change, OverDrive had secured its place as the major behind-the-scenes provider of circulating e-books in libraries. OverDrive’s work with publishers (certainly including HarperCollins),

device creators, and libraries ensures that the company remains at the center of the e-book consumption market, so many now conclude that #hcod could not have been especially good for business. (This would also partly explain the nature of their February e-mail to customers, preparing them for significant impending e-book access fees and changes impending from HarperCollins.)

To add further fuel to the #hcod fire, several well-known authors added their frustration to the discussion, garnering further attention to the issue. Best-selling HarperCollins author Neil Gaimin led this charge, saying simply, “I think it’s incredibly disappointing” (Scott 2011).

In another unexpected chapter to the #hcod story, on April 5, 2011, Josh Marwell, president of sales for HarperCollins, was quoted responding to the main #hcod issue in *Library Journal*, saying,

Is 26 set in stone? No. It’s our number for now, but we want to hear back. Immediately. Honestly, it doesn’t make sense that one size fits all. We consider it a work in progress. But this is the number that we have now. I invite you to test the water. Use it. Give us feedback. We’re in the water. We want to be here. . . . We try to be intelligent about our policy . . . and when we landed on 26, the information that we had was that most books don’t circulate 26 times. In terms of the long tail, this particular number probably works for a different part of the collection. We realize it doesn’t work for the best sellers. (Kelley 2011)

In this same interview, though, Marwell added that when it comes to selling e-books with continual open circulation and access to libraries, there are grave concerns “about the overall ecosystem. That is at the heart of the issue” (Kelley 2011).

## Looking to the Future

At the 2010 ALA Annual Conference, the EQUACC Task Force presented its final report and recommendations to the ALA Council for approval (see <http://connect.ala.org/node/151800>). These were accepted and passed by the council and then passed on to ALA leadership so that action could continue. At the heart of the task force’s recommendation: ALA must allocate resources for e-content issues. These issues must have a solid home base

within the organization. ALA had to take more organized strategic action in relation to e-content.

ALA responded to this recommendation by forming a Blue Ribbon Working Group in their organizational structure who can advise the core association on e-content and other digital matters. The group will consider key studies and reports, economic analyses, and other policy documents to shape their recommendations. As ALA executive director Keith Michael Fiels points out, “ALA’s ability to negotiate or ‘broker’ industry-wide agreements is strictly limited by anti-trust law, as is the ability of the publishers themselves to enter into any joint agreements” (e-mail communication, 2011). But the working group is a step toward increasing awareness for libraries’ needs and helping shape policy while publishers explore new models for digital alternatives.

Fiels also stated, “Our goal is to help shape the legal and policy environment so that libraries can continue to provide equitable access in a digital environment, and that libraries have the information, training and inspiration that they need to develop vibrant digital services going forward” (e-mail communication, 2011).

While the drama of this story is still unfolding, the underlying issues for public libraries are the same as they have always been. Libraries must be able to offer people the books they need and want, regardless of format. As ALA President Roberta Stevens aptly said, “The transition to the e-book format should not result in less availability.” If #hcod teaches us anything, it is that librarians, library staff, and library supporters must remain informed, vigilant, and engaged with these issues if we are to ensure e-books take their necessary place in library collections.

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# 16

## Using E-books with Reluctant Readers

KATHY PARKER

What is the difference between an obstacle and an opportunity? Our attitude toward it. Every opportunity has a difficulty, and every difficulty has an opportunity.

*J. Sidiow Baxter*

**A**s head librarian in a rural school system, it has been a privilege to share a passion for reading with students of all grade levels and colleagues alike. Naturally, the enthusiasm of those who enjoy reading is motivating and a career highlight. Unfortunately, there are a number of students who are not all that excited by the written word, although over thirty-five years of librarianship I've had the nagging suspicion that low reading enjoyment was linked more to a lack of reading skills than to the book itself. As e-book reading devices were introduced to the commercial market—most notably the Amazon Kindle 2 wireless device in 2008—it was easy for me to become an early user of and a quick convert to this particular device. The design and presentation of text was so intuitive and appealing to this experienced reader that I began to wonder how this new technology might change the habits of reluctant readers. In various discussions with teachers and administrators alike, the concept of utilizing the Amazon Kindle 2 wireless device in teaching emerged as a practical solution to an ongoing concern with a number of our students.

With consensus that the Kindle could be a valuable adjunct to the reading curriculum, we submitted a proposal for funding to the administrators of the school outlining the advantages to better learning by merging the device into the curriculum. Knowing that personal use was not a convincing argument to promote the Kindle for classroom reading, I researched how other school systems were utilizing the technology. Surprisingly, the research revealed nothing on school systems adopting e-books entirely, although there were a few individual teachers and librarians already attempting enhanced teaching techniques through the use of the Amazon Kindle 2 technology. In the presentation to the board of education and administrators, I highlighted the experiences and reported successes of these early users, as well as the promising features that the Kindle 2 could have for Seneca's students. Seneca Grade School District 170, located in rural LaSalle County, Illinois, has historically been in the forefront of educational quality, especially in the area of technology, so this Kindle concept was of great interest to the audience. After an extensive presentation, the concept of incorporating the device for supplemental learning was convincing enough for them to agree upon a trial run. The board ultimately approved a pilot program to use the Amazon Kindle 2 to be launched in 2009 for two of Seneca's middle school programs: the literature classes and the Response to Intervention Reading classes. As thrilling as it was to think of the prospects digital learning had on curriculum improvement, there was much work to be done to design and implement this initiative.

The first order of business for the project was the acquisition of eighteen new Kindle 2 e-readers. There were no stumbling blocks incurred during the purchasing process of the Kindle 2 e-readers, nor were there any challenges while downloading the content onto the Kindles. While charting new territory in technology-based curriculum in this initial pilot, we received positive feedback from all stakeholders: the students, their parents, and the teachers who adapted to the new technology. In the preliminary pilot program the three teachers involved were given six Kindles to use with their students. The two seventh- and eighth-grade language arts teachers rotated the use of the e-readers with their students on a three-week basis. This enabled each student to read a book on the Kindle 2 throughout the course of the school year. The Response to Intervention Reading teacher used her six Kindle 2 e-readers for group reading of a particular book with a smaller class size. The pilot program soon grew



into a second-stage pilot project, a similar technology-based lesson plan to the elementary level.

The second phase of the project involved the top five readers in second grade, out of a class of eighteen students; all five top readers were female students. The second-grade class was specifically chosen for the pilot as a way to mirror current research showing improved learning through adaptation of technology and text with this particular age group. As Larson (2010A) found in her study, the ability to manipulate text in digital reading devices promotes literacy and new ways for students to connect to the material. The strong readers of the group were specifically chosen for the pilot based on the mutual decision of the K–4 principal, the second-grade teacher, and myself. Because we had never used e-books with younger students we felt it best to experiment with the high reading group. We did not know what to anticipate with youth using this type of technology as described in Larson’s lesson plan, “Going Digital: Using E-book Readers to Enhance the Reading Experience” (2010B). In addition to Larson’s insightful study on the merits of e-book reading in the formative years of education, her published ReadWriteThink online lesson plan—targeted for second- through fourth-grade students—proved invaluable for Seneca’s Kindle 2 project. Of particular interest was the chapter “Going Digital: Using E-book Readers to Enhance the Reading Experience.” This lesson plan offered straightforward and uncomplicated step-by-step instructions on implementing the use of the Kindle 2 into a new and successful reading encounter for students in the second grade. As librarian of Seneca schools and primarily responsible for the Kindle 2 initiative, it was my task to assist teachers in developing curriculum. As Collier and Berg (2011) point out, librarians are regarded as credible partners in classroom instruction when promoting e-books “to build phonemic awareness, phonics, fluency, vocabulary, and comprehension” (23). As I worked in this capacity with the Kindle 2 project, it was most welcoming and gratifying to observe Larson’s inclusion of state standards in the lesson plans, as well as a comprehensive list of objectives, forty-five-minute introductory lessons, and mini lessons. Consequently, Larson’s program of study was chosen as the primary tool for assisting Dawn Stuedemann, the teacher in charge of rolling out the Kindle 2 project for the five second-grade students in her classroom at Seneca.

In an article about our second-grade pilot Kindle 2 project, it was reported that within the first week students began showing improvement

in the area of comprehension by selecting text to share what they learned with fellow students (Barack 2010). Encouraged by the advanced reading skills acquired by the five talented students through e-book reading, Stuedemann was eager to introduce the initiative to yet another group of students, a group of same-age second graders who were categorized as reluctant readers. The goal was to determine whether they too would benefit from digital reading. Not an entirely lofty goal, as we were aware of the possibilities by a few articles written on the benefits of improved reading through means of technology. The most pertinent to our study was Larson's research, which stated that "digital readers show promise in supporting struggling readers through multiple tools and features, including manipulation of font size, text-to-speech options, expandable dictionary, and note capabilities" (Larson 2010A).

The new group of second-grade students, the reluctant readers, were chosen for the Kindle project based on criteria scores from three sources: (1) Renaissance Learning STAR scores, which is a computer-adapted test that measures comprehension and provides reading grade-level equivalencies and a zone of proximal development; (2) AIMS WebFluency Reading scores, a national reading assessment measuring a child's oral fluency reading; and (3) guided reading level through the use of the A-Z Leveling System. Those five students—whose Renaissance Learning STAR scores placed them into the 1.8 to 2.8 reading levels of the zone of proximal development—were selected for the project. Interestingly, this group was comprised of all male students. Parental permission was granted for all student subject participants. Stuedemann chose *The December Secrets* from the Polk Street Kids series by Patricia Reilly Giff as the class reading assignment. The students displayed much excitement to be chosen for this program, especially because they would be able to read in such a new way. A plan outlining specific Kindle 2 skills was devised for the following Kindle 2 features:

1. Power and sleep/wake button
2. Home screen options
3. Navigating from home screen to selected e-book
4. Differences and similarities of the location feature versus book pages
5. Font size options

6. Standard dictionary found on the Kindle 2
7. Highlighting text
8. Text-to-speech option

During the orientation it was discovered that the young age was less of an obstacle operating the Kindle 2 than we had anticipated. Although a bit anxious to push the buttons, the students settled in quickly once they understood the basic steps. One student in particular had a habit of pushing the button to move the text without reading it first. Stuedemann lent assistance by reviewing the basic steps again, focusing more on the highlighting feature for this student to concentrate on.

Shortly after the orientation period, the five reluctant readers were asked to silently read a few paragraphs from their device. Those students who had difficulty at first received further assistance and instruction from the teacher. Students were encouraged to use the dictionary function if they came across a word they did not know. After the students finished reading the assigned paragraphs, they were asked to reread the material and determine what they found to be the most important sentences and ideas of the paragraphs. This instruction was designed to encourage the use of the highlighting feature on the Kindle. Although our study preceded Collier and Berg's research, they articulated our findings precisely when they stated, "[L]earners must stop and think about what they have read, make connections to what they already know and construct their own meaning" (Collier and Berg 2011, 35).

In an attempt to teach improved reading skills, the highlighting feature was used as a way for the student to answer *why* a particular sentence is relevant to the story. Once the students chose the sentence(s) of importance, the class discussed why they found the sentence to be significant. Students were able to perform this function effectively because they had some ability to explain the story due to the highlighted sections. These findings were accurate in both groups of second graders.

Although high expectations were set for the skilled readers, we observed that reluctant readers displayed some of the same enthusiasm for certain functions of the Kindle. For example, in the My Clippings function, accessed from the home screen, highlighted sentences and phrases are stored for later review. When the second graders retrieved their saved material, they were surprised to find additional information—for example,

date, time, location of the sentences, the number of sentences, and information related to their highlighting. This function had them most intrigued, and they spent a considerable amount of time reviewing the retrieval aspect. Through this function students had the ability to discuss the reasons for their highlighted choices and why they thought the sentences were important to the story. Based on their discussion, it appeared that My Clippings provided an excellent vehicle in developing comprehension skills with this group. Based on the students' responses, Stuedemann has plans to enhance this lesson through the note-taking function of the Kindle in the future.

As the librarian, I knew that many students judge a book not so much by the cover but by the physical size of the book and number of pages. With a Kindle there are location numbers rather than page numbers; therefore, the length of the story is not easily determined for the new Kindle 2 user. In addition, the ability to increase the font size results in decreasing the number of words on a page. This feature presents a less intimidating appearance for the reluctant reader. In his research, DeLamater (2010) found font size to be significant in improving reading rates in all readers when lessening the crowding of the words by increasing the font size. Counter to this benefit, however, with a group of readers using different font sizes, it is difficult to keep the group all on the same page. Stuedemann found this to be true with her reluctant readers, stating that the use of location versus page numbers was one of the few challenges in keeping the group in sync with the lesson plan. To possibly overcome this particular challenge, Stuedemann suggested having all students use the same font size.

After this pilot, Stuedemann relayed what she found to be successful with the Kindle 2 project. Her experiences were all positive: the highlighting, text-to-speech, dictionary, and font size functions were all helpful for grasping the attention of the reluctant readers and for assisting them to tackle an assignment, enough so that she is excited about the prospects of adding note taking, typing questions, and integrating meaning to the story. Stuedemann uses the word connections for comprehension. She found students who read from a Kindle 2 were making connections to reading. Stuedemann was delighted that the students showed enthusiasm every day to read, stating that the reluctant readers asked for the next Kindle 2 assignment. She would have liked more time to see the extent of effectiveness for the project, and this is a chance she is looking for next school

year. For other educators who may be considering the use of e-books/readers, she recommends that new users choose appropriate reading-level selections and plan for at least two mini lessons to orient the students on the digital technology device.

Introducing the concept of Kindle 2 e-readers to the students at Seneca Grade School is a proud accomplishment for this school librarian. The pilot in developing reading skills through the use of the Kindle 2 has been expanded to a larger number of students in various elementary grade levels. Although it is too soon to attribute Kindle 2 e-readers to improved skills, there is evidence that reluctant readers are showing an increasing interest in reading. Ideally, Seneca Grade School administrators and faculty will embrace the possibilities that can be found in utilizing Kindle 2 devices in other subject matter classrooms. If the Kindle 2 can ignite reluctant readers to reading, imagine the possibilities Kindle could have for reluctant learners.

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# INDEX

## A

- ABC-CLIO (data downloading), 98
- academic libraries
  - accessing dilemmas, 62–63
  - e-books access to, 61–70
  - future of e-books at, 69–70
  - incorporating e-books, 67–69
  - mobile e-book access, 63–64
- access points, consolidated, 156
- access to e-books
  - accessibility considerations, 35–60
  - digital divide, 17–34
  - mobile environment, 61–70
  - preservation of, 71–91
  - resource description and access, 103–114
  - weeding of, 93–102
- accessible instructional materials (AIM), 37
- ADA Title II, 44
- Adam Matthew (digitized collection), 88
- Adobe Content Server (ACS), 129
- Adobe Digital Editions, 138
- Adventures of Library Girl (website), 218
- advertising pilot programs, 189
- agencies, preservation support, 74–75
- AIM commission, 38, 48
- AIMS WebFluency Reading, 234
- A&M Records v. Napster*, 173
- Amazon file format (AZW), 64
- Amazon Kindle 2, 46, 64, 67
- American Association of Publishers, 45
- American Council of Learned Societies, 167
- American Council of the Blind (ACB), 47
- American Psychological Association (APA), 98
- Americans with Disability Act (ADA), x, 37
- Android tablet, 138
- Anglo-American Cataloging Rules, 2nd Edition* (AACR2), 103–107, 110–113
- Ann Arbor District Library (Michigan), 62
- APH (authorized entity), 45
- Apple. *See specific Apple products*
- Applied Engineering and Technology Library (Texas), 11

archival systems, 74  
 Arizona State University, 47  
 assistive technologies, 38–39  
 Association of American Publishers,  
 ix, 71  
 Association on Higher Education and  
 Disability (AHEAD), 45–46  
 authenticity, e-books and, 73–74  
 Authors Guild, 46  
 A–Z Leveling System, 234

## B

Baker, Nicholas, 3  
 Barnes & Noble, ix  
 Better World Books, 99  
 bibliography  
   functional requirements (FRBR),  
   107–110  
   metadata, 74, 86  
 Blackboard (software), 125, 189  
 Blount, Roy Jr., 46  
 Blue Ribbon Working Group, 152  
 book sharing, 199  
 BookReader, 131  
 Bookshare, 45  
 Bradley, Jana, 161  
 Braille readable formats, 35, 38, 43,  
 52  
 Brantley, Peter, 130  
 Briar Cliff University (Iowa), 186  
 Brisco, Shonda, 199  
 British Library, 75  
 Brown University (Rhode Island), 2  
 budgeting and public libraries  
   collection planning, 132–133  
   dedicated trainers and, 139–141  
   e-book providers, 128–131  
   e-readers and, 131–132  
   legal considerations and, 131–132  
   policies and, 134–135  
   training challenges, 137–138  
 Burleigh, David, 129  
 Bush, Vannervar, 95  
 business model challenges, 76–80

## C

California Digital Library's Digital  
 Preservation Repository, 76  
 captioning, e-books and, 39  
 catalog users, tasks of, 107  
 cataloging procedures, Kindle, 222,  
 226–227  
 Center for Information Technology  
 (CIT), 185  
 certification process, devices, 156  
 Chafee amendment, 45  
 Charlotte Mecklenburg Library (North  
 Carolina), 127  
 Chief Officers of State Library Agencies  
 (COS LA), xiii, 129, 155–156  
 Children's Internet Protection Act (CI  
 PA), 210  
 civil rights, laws and projects, 46–47,  
 123  
 classrooms. *See* school libraries  
 Coalition for Networked Information  
 (CNI), 61–62  
 cognitive disabilities, e-books and,  
 38–42  
 collection development (CD), 96  
 collections  
   digitized, 88  
   print collections, 6–7  
   planning, 132–133  
 community-supported preservation  
 efforts, 75–76  
 consumer reviews, Nook, 133  
 content creation  
   author support, 158–160  
   Chief Officers of State Library  
   Associations (COSLA), xii,  
   155–158  
   print-on-demand, 162–167  
   publishers and, 167–168  
   self-publishing, 160–162  
 content management systems  
   future steps and solutions, 177–182  
   Red Rocks Community College, xii,  
   175–177

conversion of content, legal issues, 78  
 copyright considerations, 77, 121  
 Corbett, Tom, 7–10  
 Council on Library and Information Resources, 6  
 COUNTER (evaluation data), 97  
 course management software, 125  
 Creative Commons licenses, 219  
 CRL Trustworthy Repositories Audit and Certification, 75  
 cross-training, e-books and, 29–30  
 cultural heritage organizations, 88–89  
 Cushing Academy (Massachusetts), x, 7–9

## D

DAISY e-book format, 35, 51–53  
 Dear Colleague (letter), 47–48  
 derivative works, 111  
 Destiny OPAC, 222  
 dexterity devices, 39  
 digital considerations  
   access to e-books, 20–21, 24–26  
   advocates, 30–31  
   agencies and, 74–75  
   authenticity, 73–74  
   books as a unit, 81–82  
   case example, 22–24  
   challenges to, 76–80  
   collections and, 88  
   cross-training, 29–30  
   defined, 17  
   for digital text, 38  
 digital library spaces. *See* library spaces, digital and physical  
 digital object identifiers (DOIs), 118  
 digital rights management (DRM), 4, 45, 71, 80–81  
 Digital Talking Books Standards Committee, 40  
 disabilities  
   academics and, 58  
   Americans with Disability Act, x, 37

Association on Higher Education and Disability (AHEAD), 45–46  
 cognitive and hearing, 38–42  
 Individuals with Disabilities Education Act, 44  
 learning types, 39  
 print types, 37  
 Doctorow, Cory, 150  
 Dragon Dictate (speech-to-text), 39–40  
 DRAMBORA (preservation model), 75  
 Drucker, Peter, 200  
 Dublin Core Metadata Element Set, 86, 104  
 Dynabook, 95

## E

e-books, impact on libraries, 171–178  
   political and legal solutions, 180–182  
   technical solutions, 179–180  
 e-book access  
   accessibility considerations, 35–60  
   higher education, e-books and, 44–49  
   and household income, 17–31  
   limitations to, 145–153  
   mobile environment, 61–70  
   preservation of, 71–91  
   resource description and access, 103–114  
   weeding of, 93–102  
 e-book integration in school libraries  
   adopting e-books, 207–218  
   choosing e-books, 196–198  
   issues and concerns, 201–204  
   leadership and obstacles, 198–199  
   mobile device choices, 199–201  
 e-book packaging, 83–85  
 e-reader certification program, 129  
 e-reader pricing, 27–28  
 e-readers. *See specific devices*  
 e-writing, 157  
 EAD (encoded archival description), 104–105



eBook Educators Group (EduKindle Ning), 209  
 ebrary (electronic library), 130  
 EBSCOhost, 98, 131, 201  
 EDItEUR (European book trade standards), 56  
 editions, updates, and retractions, 78–80  
 e-book sharing, 197, 199, 201  
 embedded content, legal issues, 77  
 encoded metadata, 74  
 enhanced e-books  
   authors and, 124–125  
   defined, 115–117  
   development of, 117–118  
   how to's, 122–124  
   pricing and versions, 120–122  
   standardizing, 120  
   STEM publishing, 118–119  
 EPUB 3 (format), 37, 51–53, 83  
 Equitable Access to Electronic Information Task Force (EQUACC ), 148–149  
 ESL (English as a Second Language) learners, 208  
 EspressoNet (software), 163  
 Espresso Book Machines (EBM), 3, 163  
 evaluation policies, weeding and, 95–96  
 expression level, 109

## F

Federal Rehabilitation Act, 41, 44  
 fees and fines for loaners, 191  
 Ferris, William, 120  
 filtering, school libraries and, 202  
 fines and fees for loaners, 191  
 Follett e-books, 201  
 formatting  
   Amazon file format (AZW), 64  
   Braille readable formats, 35  
   DAISY e-books, 35, 51–53  
   e-books, 49–53

EPUB 3, 51–53, 83  
 HTML, 83  
 large print, 35  
 metadata, 86  
 MOBI / AZW, 50–51  
 PDF, 50, 83  
 presentation types, 82–83  
 Proprietary XML (format), 83  
 school libraries and, 199–201  
 Frederick Emmons Terman Library (Stanford), 9  
 Free Library of Philadelphia, 159  
 Functional Performance Criteria, 41  
 functional requirements for  
   bibliographic records (FRBR), 107–110  
 funding  
   e-book demand, 141–142  
   school libraries and, 210  
   Title 1, 30

## G

Gadget Bar, 10  
 Gaimin, Neil, 151  
 Gale's Virtual Reference Library, 88, 172, 199, 201  
 Giff, Patricia Reilly, 234  
 Google Books project, 3  
 grant partners, 30  
   and e-books, 30  
 Grove Art (online encyclopedia), 117  
 Guild, Reuben A., 2

## H

Hammond, Joanne, 197  
 HarperCollins, 145–153  
 HathiTrust, 76  
 hearing disabilities, 38–42  
 Herdener, Drew, 132  
 high school. *See* school libraries  
 history of libraries, 2–4  
 Howe Library (New Hampshire), 132  
 HTML (format), 83

**I**

iBooks for EPUB, 54  
 identifiers, 87  
 impairments, e-books and, 39–42  
*In media res* (journal), 119  
 indie publishers, 130, 157  
 Individuals with Disabilities Education Act (IDEA), 44  
 integrated library system (ILS), 96  
 Inter-University Consortium, 76  
 International Association for Information and Image Management, 50  
 International Book Number System (ISBN), 87  
 International Digital Publishing Forum, 71, 73  
 International Dyslexia Association, 46  
 International Federation of Library Association and Institutions, 107  
 Internet, access to, 20–24  
 Internet Archive, 130  
 interventions, e-readers used as, 232  
 iPad loaner program, 189–193  
   introduction, 184  
   pilot program, 185–189  
   program future, 193–194  
   survey, 188  
 iPhone, influence on e-books, 117  
 iPod Touch, 64–65  
 iRex iLiad, 64

**J**

JAWS (screen reader), 38  
 Jen-Hsun Huang School of Engineering Center, 9  
 Johnson, Roxanne, 226  
 Josephine, Helen, 9–10  
*Journal of Visualized Experiments*, 119

**K**

K-NFB's Blio Reader, 54  
 Kahle, Brewster, 130

Kawasaki, Guy, 197–198  
 Kay, Alan, 95  
 Kindle DX, 10, 35, 175  
   lawsuits, 46–47  
 Kindle 2, 46, 64, 67  
 Kindle Pilot program (Unquiet Library, Creekview High School, Georgia)  
   best practices and  
     recommendations, 225–230  
   circulation procedures, 221–223  
   future of, 227–228  
   Kindle LibGuide, 222  
   response to, 223–225  
 King, Brianna, 140  
 Kobo, 138  
 Kurzweil 3000 (literacy software), 39

**L**

Large Print (format), 35  
 lawsuits, e-book accessibility and, 46  
 Learning Ally, 45  
 learning disabilities, e-books and, 39  
 legal considerations  
   contexts, e-books and, 44–49  
   e-books and, 77–78, 131–132  
   solutions for, 180  
 Lehmann, Chris, 204  
 libraries, lending and public  
   collection planning, 132–133  
   dedicated trainers, 139–141  
   e-book providers, 128–131  
   e-readers and, 131–132  
   legal issues and, 131–132  
   policies and, 134–135  
   training challenges, 137–138  
 Lewellen, Andrew, 201  
 libraries  
   as author support, 158–160  
   media production units and, 54–58  
   paperless, 5–6  
   print on demand support in, 162–167

- libraries (cont.)  
 self-publishing and, 160–162  
 using e-books as advantage, 171–182
- Library Journal*, ix, x, 28, 131, 132, 150
- Library Love Fest* (blog), 147–148
- Library of Congress (LC), 104
- Library Renewal, 203
- library spaces, digital and physical  
 Cushing Academy, 7–9  
 e-books and, 4–45  
 future of, 14–15  
 history of, 2–4  
 paper collections, 6–7  
 paperless, 5–6  
 Stanford University, 9–11  
 University of Texas, 11–13
- licensing e-books, challenges of, 76
- literacy software, 39
- Loertscher, David, 196
- Lowcountry Digital Library (Charleston), 123
- Lutz, Ellen, 11
- Lynch, Clifford, 61–62
- M**
- Mac Zoom (screen magnifier), 38–39
- MAGic (screen magnifier), 38–39
- MARC (Machine-Readable Cataloging), 98, 104–105, 181
- Mark & Emily Turner Public Library (Maine), 135
- Marwell, Josh, 151
- mass-market e-books, 87–88
- MathML, 52
- media centers. *See* school media centers
- Mellon Foundation, 126
- Memex, 95
- Mentor Public Library (MPL), 132
- MESH (medical subject headings), 104
- Messer, Daniel, 139–141
- MetaArchive, 76
- metadata, 51, 74–75, 78, 80–81, 84, 88–89, 121, 160  
 bibliographic, 74, 86  
 and metadata formats, 86
- Michael, Keith, 152
- MOBI/ AZW (format), 50–51
- Mobile Access to E-books at Yale (study), 63–67
- mobile devices  
 accessing, 62–63  
 changes in, 67–69  
 defined, 63  
 device types, 64–65  
 e-book access, 63–64  
 resources for, 65–66  
 Yale mobile access, 63–64
- mobility devices, 39
- Mobipocket, 83
- MODS (metadata object description schema), 104
- Moodle (software), 125
- multimedia e-books, 117
- MyiLibrary, 130
- Myrtle Grove Middle School (North Carolina), 207–209
- N**
- Napster, 173
- National Association of Social Workers, 29
- National Center for Family and Community Connections with Schools, 30
- National Federation of the Blind (NFB), 46
- National Information Standards Organization (NISO), 40
- National Instructional Materials Accessibility Standard (NIMAS), 44
- National Library of the Netherlands, 75
- National Library Service, 45
- Neiburger, Eli, 62–63, 160–161

- Netflix, 179
  - NetLibrary, 130
  - Newport Beach library system
    - (California), 5
  - Newyear, David, 132
  - Nook readers
    - budgeting, 210–211
    - choosing books, 211–212
    - classroom instruction and, 215–216
    - future and, 217–218
    - incorporating into library, 208–210
    - instructional goals and, 211
    - lessons learned, 216–217
    - preparations for student use, 212–215
  - NookColor, 136, 138
  - North Carolina Department of Public Instruction, 210
  - NVDA (screen reader), 38
- O**
- Oberlin College Library (Ohio), xii, 183–195
  - Office for Civil Rights of the Department of Education, 47
  - Ohio State University, 43
  - OhioLINK (consortium), 98
  - On Demand Books, 163
  - online catalogs
    - differences with print, 98–100
    - similarities with print, 95–97
    - weeding, 94–95
  - Open Annotation Collaboration, 126
  - Open eBook (OEB), 73
  - Open Library project, 130–131
  - O'Reilly, Tim, 126
  - orphan works, defined, 88
  - outbound linking, 115–116
  - OverDrive (website developer), 98, 127–131, 145–153
- P**
- Pandigital (e-reader), 138
  - patrons, affluence and, 27–28
  - PDF (format), 50, 83
  - permissions, third-party copyright, 121
  - pilot programs
    - e-reader experiment, 175–177
    - iPad loaner program, 185–189
    - Kindle, 219–230
  - PoD books, 164–166
  - Poet's House, 162
  - policies, for device protection, 134
  - Polldaddy, 200
  - PollEverywhere, 200
  - Portico (preservation agency), 76
  - Potash, Steve, 145
  - poverty, and access to e-books, 18–20
  - preservation efforts, national, 75
  - preservation requirements
    - agencies for, 74–75
    - business modeling challenges, 76–77
    - content challenges, 78
    - digital considerations, 72–75
    - digital rights management (DRM), 80–81
    - digitized collections, 88–89
    - e-book varieties, 87–88
    - editions, updates, and retractions, 78–80
    - factors concerning, 83
    - identifiers, 87
    - legal issues, 77–78
    - metadata and formats, 86
    - organizational models, 75–76
    - packaging, 83–85
    - presentation formats, 82–83
    - units of publication, 81–82
  - print disability, defined, 37
  - print on demand (POD), 155–169
  - print resources, weeding, 93–102
  - Project Gutenberg, 88, 95, 181
  - Project Tomorrow, 197
  - Proprietary XML (format), 83
  - ProQuest (digitized collection), 63, 88, 172

providers, e-book, 128–131  
*Public Libraries* (journal), 94  
 public library environment  
   collection planning, 132–133  
   e-book providers, 128–131  
   e-book training, 136–141  
   e-reader policies, 134–135  
   laboratories and, 157  
   legal issues, 131–132  
   Sony Reader program, 135–136  
 publishers and publishing  
   publishers, e-books and, 55–57  
   publishing, indie, 155–169  
 purchasing e-books, challenges, 76

## Q

Queen Creek Library (Arizona),  
 139–141  
 quick response (QR) codes, 168

## R

RDA (resource description access)  
   AACR2, 107–108  
   benefits of, 106–107, 110–113  
   defined, 103–104  
   FRBR, 107–110  
   moving toward, 104–106  
 R2Digital Library, 100  
 Read and Write Gold (literacy  
   software), 39  
 Reader Library Program, 135–136  
 reading  
   e-books used for disabilities, 38–42  
   future of, 157  
   platforms of, 53–54  
 Reading Rights Coalition, 48  
 ReadWriteThink (lesson plan), 233  
 recession, economic, 18–20  
 Red Rocks Community College (CO),  
 xii, 175  
 reference content databases, 88  
 reluctant readers, 235–236  
 Renaissance Learning STAR, 234  
 Response to Intervention (RtI), 232

retractions, legal issues and e-book,  
 78–80  
 Rittenhouse, 100

## S

Sage (data downloading), 98  
 Sakai (software), 125  
 scholarly e-books, 87  
 school libraries  
   adopting e-books, 207–218  
   best practices, 225–227  
   choosing formats, 199–201  
   circulation procedures, 221–223  
   future of Kindle at, 227–228  
   issues and concerns, 201–204  
   Kindle use and, 220–221  
   leadership and obstacles, 198–199  
   mobile device choices, 199–201  
   student response to Kindle, 223–  
   225  
*School Library Journal*, 7, 197  
 school media centers  
   choosing e-readers, 208–210  
   e-readers in the classroom, 215–218  
   instructional goals, 211  
   paying for e-readers, 210–211  
   prior to using e-readers, 212–215  
 schools, wireless connection  
   considerations, 224–226  
 science, technology, engineering, and  
   mathematics (STEM), 43, 96  
 screen magnifiers (Windows 7), 38–39  
 Section 508 (Federal Rehabilitation  
   Act), 41  
 Section 504 of ADA, 44  
 self-publishing efforts, xii, 157,  
 160–162  
 Semantic Web, 114  
 Seneca Grade School (Illinois), 221  
 Shaw, Lisa Neal, 135–136  
 social workers, librarians as, 29–30  
 software  
   Blackboard, 125  
   course management, 125

- device makers and, 57
  - EspressNet, 163
  - Kurzweil 3000, 39
  - Moodle, 125
  - Read and Write Gold, 39
  - Sakai, 125
  - WYNN, 39
  - Sony Reader, 64
    - Library Program, 135–136
  - Southern Oral History Program, 123
  - Southern Spaces* (journal), 119
  - speech-to-text (Windows 7), 39–40
  - staff training, e-books and, 136–137
  - stakeholders, e-books and, 54–57, 157
  - standards for e-books, 40–42, 120
  - Stanford University (California), x, 9–11
  - Stark County District Library (Ohio), 127
  - STEM journal publishing, 118–119
  - Stevens, Roberta, 148–149, 152
  - Stevenson, S., 31
  - strength devices, 39
  - students, e-readers and, 206–218
  - SUDOC (superintendent of documents), 104
  - Supplemental Nutrition Assistance Program (SNAP), 19
  - surveys
    - iPad loaner Pilot, 188
    - student Kindle usage, 224–225
    - SurveyMonkey, 200
  - SUSHI (evaluation data), 97
  - Syracuse University (New York), 1
- T**
- Tapscott, Donald, 196
  - technological segregation, 31
  - technology in schools
    - choosing e-books, 196–198
    - issues and concerns, 201–204
    - leadership and obstacles, 198–199
    - mobile device choices, 199–201
    - STEM, 43, 96
      - system compatibility, 72–73
    - Telecommunications Act, 31
    - Temporary Assistance for Needy Families (TANF), 18, 21
    - text-to-speech, 47, 49
    - textbooks, enhanced e-books and, 125
    - 3M Library Systems, 129
    - Title 1 programs, 30, 208
    - title selection in schools, 211–212
    - trainers, dedicated, 139–141
    - training
      - challenges of, 137–138
      - cross-training e-books, 29–30
      - dedicated and undedicated, 139–141
      - public library environment and, 136–141
      - staff and patrons, 136–137
      - vendors and, 139
    - Tribe, Beth, 138–139
- U**
- units of publication, 81–82
  - universal access, 31
  - University of Chicago (Illinois), 105
  - University of North Carolina, 123
  - University of Texas, x, 11–13
  - Unquiet Library (Creekview High School, Georgia), 219–230
  - updates, e-books and, 78–80
  - User Agent Accessibility Guidelines (UAAG), 40
- V**
- Valenza, Joyce, 195
  - vendors
    - e-books and, 76–77
    - questions to ask, 225
    - training and offerings, 139
  - visual impairments, 38–42
  - VitalSource/CourseSmart Bookshelf and Inkling, 54

VoiceOver (screen reader), 38  
VPAT (voluntary product accessibility  
template), 54

## **W**

web-based searchable databases, 166  
Web Content Accessibility Guidelines  
(WCAG), 40–41  
welfare, defined, 19  
Westlake Porter Public Library, 137  
Wilson, A. Paula, 94  
Windows 7  
    screen magnification, 38–39  
    speech recognition, 39–40  
World Intellectual Property  
    Organization, 49

WorldCat Resource Sharing, 130  
WYNN (literacy software), 39

## **X**

XML files, metadata and, 74

## **Y**

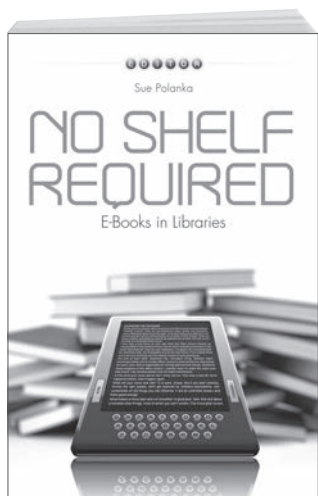
Yale University Library, study to test  
    access, 63–67

## **Z**

Z. Smith Reynolds Library (North  
    Carolina), 109  
ZoomText (screen magnifier), 38–39

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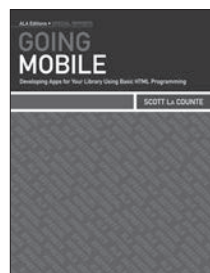


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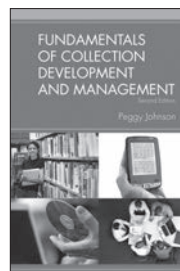
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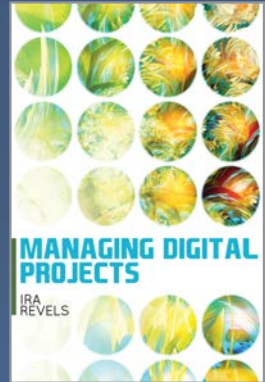
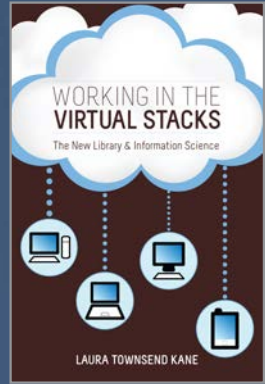
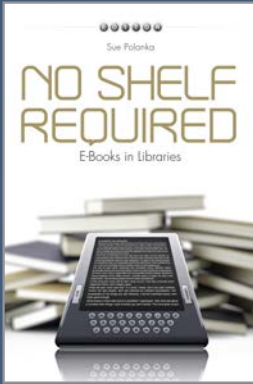
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