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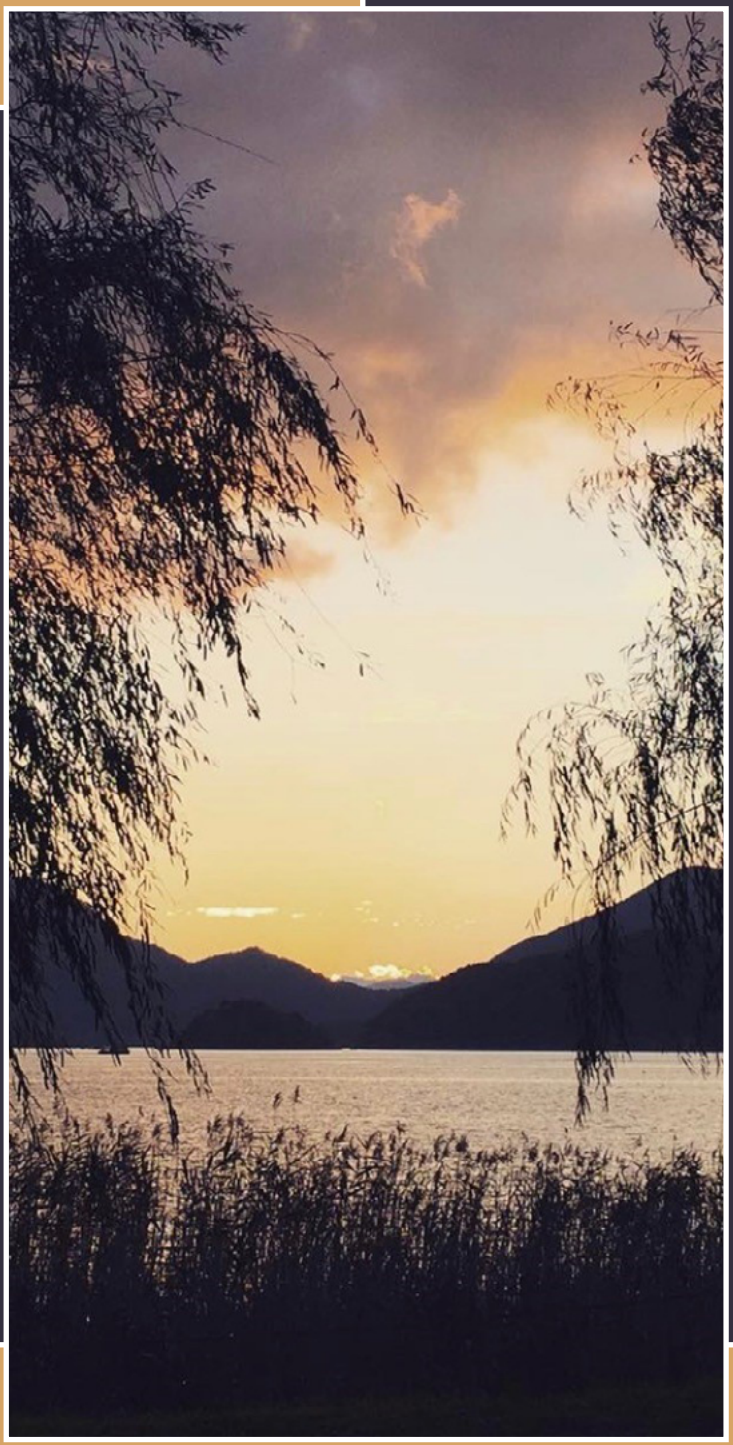

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Cover image: "Mt. Fuji at dusk," Brooke Morris-Chott, October 2015.

Editorial

We are Core

I belonged to the Association for Library Collections & Technical Services (ALCTS) (formerly Resources and Technical Services Division (RTSD)) for my entire professional career. It was my home in ALA, and where I forged relationships, learned valuable skills for my career, took advantage of continuing education offerings, and contributed to the profession through presentations, committee and task force work, and in editing ALCTS publications. And now, after considerable discussion and planning, ALCTS, along with the Library Leadership & Management Association (LLAMA) and the Library Information Technology Association (LITA), are now Core: Leadership, Infrastructure, Futures. This new division will draw on the strengths of the three former divisions. The Oxford English Dictionary provides various meanings for the word "core," including "The central or innermost part, the 'heart' of anything," and "a central portion that is cut out, or that remains after using the surrounding parts." These definitions are quite appropriate and fitting for Core.

Core became official on September 1, and a new website, www.ala.org/core, was launched. Two items of interest on the Core website (https://core.ala.org) are "6 Top Questions About Core" (https://core.ala.org/6-top-questions-about-core), which addresses member concerns about the division, and "Core Overlap" (https://core.ala.org/core-overlap). The new division launched while many of us are still working from home or are just returning to work on-site. Perhaps this is an ideal time to launch a new division when there are so many other transitions that affect our work, home lives, education, how we purchase food and goods, etc. occurring. It is a time of change, a time to re-examine, and a time to prioritize. After belonging to one division for many years, I am looking forward to the opportunities offered by Core, including the chance to work with new colleagues and to perhaps pursue new and different opportunities.

LRTS, featuring the new Core logo, will continue to be provided as a member benefit for your professional reading, along with the former LITA journal *Information Technology and Libraries* (*ITAL*) and the former LLAMA journal *Library Leadership & Management* (*LL&M*), all of which are available at www.ala.org/core/publications/journals. My term—as well as *LRTS* Book Review Editor Elyssa Gould's—has been extended an additional year during the transition to Core. Our terms will end in December 2021, and there will be overlap between us and our successors. I urge you to consider applying for *LRTS* Editor or to nominate someone when an announcement is made. It is a rewarding experience and one I have truly enjoyed.

I now turn your attention to the contents of this issue, which I hope you find beneficial:

- In what is perhaps what has been one of the most fun papers to read and review, Catherine Oliver explores the genre of mystery fiction and discusses how the Library of Congress Genre/Form Terms (LCGFT) provides new ways for catalogers to facilitate access to this genre. Determining subgenre terms is the crux of the issue, and "Cozies, Capers, and Other

Criminal Endeavors: Utilizing Taxonomies of Mystery Fiction for Improved Genre Access" is a delightful and insightful examination of this issue.

- Censorship and trigger warnings have been recent topics of much discussion in our profession. There have been numerous conversations on library discussion lists about such warnings and how they may be handled. This topic is relevant to a particular publication, *The Pernkopf Atlas of Anatomy*. It is a given that a library's collection will include books that represent different eras of history, schools of thoughts, and points of view, and there will undoubtedly be books in any library's collection that are controversial. In the paper "A Reconsideration of Library Treatment of Ethically Questionable Medical Texts: The Case of the Pernkopf Atlas of Anatomy," authors Laurel Scheinfeld, authors Laurel Scheinfeld, Jamie Saragossi, and Kathleen Kasten-Mutkus discuss this controversial atlas by sharing the results of a survey they conducted of libraries that hold it in their collections.
- Storing items in remote storage raises many questions, including the condition of materials, whether to retain or discard materials if they are also available digitally, and how these materials should be represented in one's catalog (full level cataloging, brief record?). In her paper, "Moving a Unique Collection to Storage: Improving Access Now and Later," Jennifer A. Maddox Abbott discusses how the University of Illinois at Urbana Champaign collected college and university publications for several decades yet lacked the resources to catalog them, rendering them inaccessible except through browsing the shelves. This is a typical problem with unique collections or donated materials, and the University of Illinois at Urbana Champaign University Library initiated a project to catalog and transfer them to a high-density storage facility. In addition, part of the collection was also digitized. Abbott's paper provides an overview of the process of this large-scale collection management project and an evaluation of the accessibility of these materials before and after the project commenced.
- Book reviews, which are a regular feature in each issue.

From the President

ALCTS Annual Report, 2019–2020

Jennifer Bowen, ALCTS Past-President

After serving as ALCTS President from July 2019 to June 2020, I have the privilege of presenting the final Annual Report for ALCTS as the division concludes its existence on September 1, 2020. The end of ALCTS's more than sixty-year history under the name the Association for Library Collections & Technical Services, and before that the Resources and Technical Services Division, is yet the latest milestone in ensuring that ALA provides an appropriate and sustainable organizational structure to support the work of library professionals and others who work with library collections. We now can celebrate the launch of the new ALA division, Core: Leadership, Infrastructure, Futures, as a member-driven venture created collaboratively by members of ALCTS, the Library Information Technology Association (LITA), and the Library Leadership & Management Association (LLAMA).

In my editorial in the July issue of *LRTS*, I wrote that we have a lot to celebrate in both the promise of our new division and in the many accomplishments of ALCTS and ALCTS members. In this report, I will highlight some of these accomplishments. Prior to becoming part of Core, ALCTS consisted of roughly a hundred member-driven committees, interest groups, and other working groups that mostly continued their activities from 2019 through 2020 within the context of a possible transition to Core. This report celebrates the continued work of ALCTS members despite the uncertainty about the future of the division.

I am indebted to Kerry Ward and all of the former ALCTS (and now Core) staff at ALA for their efforts to collect and organize this information. My thanks also to the ALCTS Planning Committee, chaired by Katharine Leigh, for organizing the achievements of many ALCTS groups and mapping them to the ALCTS 2019 Strategic Plan.

ALCTS 2019 Strategic Achievements

With the knowledge that the ALCTS, LITA, and LLAMA Boards and memberships might be voting in early 2020 to create a new division, the ALCTS Board approved a one-year Strategic Plan in June 2019 to guide ALCTS activities from 2019 to 2020, during what indeed ended up to be a transitional year. This one-year plan focused on two priority areas that the Board assessed would serve ALCTS well whether or not the votes to create Core took place later in the year. Primary among these priorities was to infuse each of the division's goals with strengthening ALCTS's focus upon diversity, equity, and inclusion, thus more fully aligning ALCTS with the mission, vision, and values being proposed for the new division and with ALA's Core Values of Librarianship. Second, the strategic plan prioritized ALCTS activities to examine its own organizational structure with an eye toward sustainability whether ALCTS became part of a new division or not. During this transitional year, ALCTS achieved the following milestones toward accomplishing the goals in this plan:

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Goal I. Strengthen advocacy for equitable access to and preservation of resources and information for all users.

ALCTS's efforts in this area spanned publications, programming, and advocacy. A few highlights follow:

- The eScholarly Communication Interest Group sponsored programming at Midwinter 2020 to support the resource acquisition and lifecycle of open access monograph publishing;
- The ALCTS journal, *LRTS*, continues to provide author-friendly copyright terms for published articles; and
- The ALCTS Monographs group published many resources on equitable access and preservation, such as the 2019 publication *Assessment Strategies in Technical Services*, which broadly addresses equitable access for users.

Goal II. Assess current divisional programs and services

ALCTS committees and interest groups worked with LITA and LLAMA to advance a new division and identified opportunities to streamline the work of the division and its sections to prepare for future organizational changes. The ALCTS Interim Executive Director served on the ALA Steering Committee for Organization Effectiveness (SCOE) and advised the ALCTS Board on how ALCTS might be affected by that group's work. Additional activities related to this goal included:

- In collaboration with the LLAMA Mentoring Committee, the ALCTS Leadership Development Committee opened participation in this year's mentoring program to current members of ALCTS, LLAMA, and LITA;
- The Advocacy and Policy Committee recommended a group within Core to advocate specifically for technical services staff within ALA and libraries; and
- The ALCTS Standards Committee worked closely with the CRS Standards Committee to develop a new draft charge for a potential merged committee under Core.

Goal III. Strengthen our diversity and inclusiveness

From 2019 to 2020, ALCTS groups focused upon the plan's subgoal to "Reach out to historically under-represented groups to increase awareness and encourage their participation." Selected highlights are:

- The Technical Services Directors of Large Research Libraries Interest Group held a session at Midwinter 2020 on prioritizing diversity in collections backlogs;
- The ALCTS/LITA/LLAMA Presidents Program Committee planned the three divisions' first joint Presidents' Program for Annual 2020 to feature Dr. Meredith Clark, assistant professor in the Department of Media Studies at the University of Virginia (UVA) and media consultant for diversity, ethnicity, and inclusion in a program that would explore how libraries can respond to traumatic/sudden events in their communities, both short- and long-term. With the cancellation of the in-person ALA Annual Conference, Dr. Clark has been rescheduled as a keynote speaker for the Fall 2020 Core Forum;
- In late summer 2019, the ALCTS Board collaborated with other ALA divisions to sponsor thirty-five ALCTS leaders to participate in Hollaback!'s online Bystander Training. The goal of this training was to empower those who attended to respond when an incident of deliberate or unconscious bias occurred during an ALCTS event or meeting; and
- Several ALCTS Division Committees, such as the Continuing Education Committee, the Monographs Series Editorial Board, the Program Committee, and Publications Committee actively cultivated and promoted inclusion of under-represented groups in their work, including open calls for participation in webinar development and publications, highlighting proposals from persons of underrepresented groups and incorporating diversity and inclusiveness in the evaluation of program proposals.

Goal IV. Develop and promote Association activities in multiple formats to increase opportunities for virtual and year-round participation

ALCTS groups made significant progress toward this goal, even before COVID-19 necessitated the cancellation of the in-person 2020 ALA Annual Conference. While ALCTS continued to have a presence at ALA Midwinter 2020 in Philadelphia, many ALCTS committees and interest groups opted to hold their Midwinter meetings online to increase committee participation among members who could not attend the conference in person. In addition:

- The Continuing Education Committee continued its work of providing numerous webinars throughout the year, including offering free e-Forums;
- The ALCTS Publications Committee offered presenters at conferences an avenue to publish with

ALCTS, thereby broadening the reach of their presentation from the conference to the greater community;
- The ALCTS Fundraising Committee raised funds for in-person and virtual events, such as Preservation Week, Preservation in Action, ALA Annual preconferences, the President's Program, the Midwinter reception, ALCTS/LITA/LLAMA Exchange, webinars, and the Fundamentals courses; and
- In May 2020, the three divisions worked together to deliver a virtual conference, The Exchange: An ALCTS/LITA/LLAMA Collaboration" (details below).

ALCTS Activities by Area, 2019-2020

With much of the attention of ALCTS members during the 2019-2020 timeframe focused on envisioning a possible future for the division's work as a part of Core, some ALCTS committees were less active during this time than in previous years. Nevertheless, many essential ALCTS and ALCTS section groups continued their work without interruption and provided continuing value to ALCTS members in areas including continuing education, professional development, leadership development, standards development, and advocacy. Because many of these activities were ongoing from previous years or were planned before the revised 2019 Strategic Plan was approved, they were more closely aligned to the overall mission of ALCTS rather than the specific goals in the plan.

Programming and Continuing Education continued to be a strength for the division. For many years ALCTS provided programming in multiple formats (physical and virtual), which was fortuitous this year with the reduction of a physical presence at the ALA Midwinter Meeting and much of the world working from home due to COVID-19. With the cancellation of many in-person events, ALCTS groups and members quickly and successfully transitioned their activities to a virtual environment.

ALCTS Awards

ALCTS award juries selected deserving award recipients for twelve division and section-level awards; in addition, three ALCTS members were selected by the ALCTS President to receive Presidential Citations for their contributions to planning for Core. Zoë McLaughlin, South and Southeast Asian Studies Librarian at the Michigan State University Libraries, was selected as the ALCTS-sponsored Emerging Leader for 2019-2020. Nearly one hundred ALCTS members, award recipients and their family, friends and colleagues attended the virtual ALCTS Awards Ceremony on July 14, 2020, which was followed by a virtual ALCTS Happy Hour with about fifty attendees.

ALCTS Continuing Education

Seven Fundamentals courses were offered this year, covering Acquisitions, Electronic Resources, Collection Development and Management, Collection Assessment, Preservation, Cataloging, and Metadata. More than five hundred and fifty individuals registered for the courses. ALCTS also offered over twenty webinars in FY21, including two that were presented for free during Preservation Week. Overall, nearly seven hundred individuals and groups registered for webinars.

Conference Programming

Prior to the move from an in-person to a virtual ALA Annual, the ALCTS Program Committee developed a full slate of programming with an increasing focus on topics advocating equitable access to resources. This included a preconference on cataloging ethics and preservation in times of crisis, among others. ALA selected two ALCTS programs for Virtual Annual: "Happy Together?: Communication and Collaboration Between Technical Services and IT" and "The Technical Services Learning Organization: Transformation through Training and Development." The individuals who had planned other programs have been offered the option to convert them to webinars, which should provide many possible programming topics for Core's inaugural year. The committee has incorporated diversity and inclusiveness as criteria in the evaluation of program proposals submitted. Prior to the cancellation of ALA Annual, program planners also explored with ALCTS staff how to promote inclusiveness during presentations through increasing the availability of microphones for audience questions and for speakers on panels so that all audience members could hear all aspects of the session. In lieu of face-to-face meetings at the Annual Conference, ALCTS also held a Virtual Interest Group Week during the week of June 8, 2020, with all events free of charge.

ALCTS/LITA/LLAMA Exchange

In May 2020, the three divisions worked together to deliver the Exchange: An ALCTS/LITA/LLAMA Collaboration. Using the successful 2017 ALCTS Exchange as a model, members from the three divisions collaborated for the better part of a year to develop an online conference with

content and themes relevant across the three divisions. The ALCTS Office took the lead in managing the budget, contracting with external vendors, and providing staff support. ALCTS Past-President Kristin Martin chaired the Exchange Working Group. There were a total of 249 registrants, both groups and individuals. Hosting the Exchange across the three divisions provided an opportunity for the three divisions to work together and a launching point for the professional development activities of Core. The success of the event bodes well for it to become a staple of professional development for Core. Assuming a post-pandemic world supports in-person professional events, the Exchange Working Group recommended offering the Exchange in alternating years with the in-person Core Forum (which will also be held virtually in November 2020).

Preservation Week

This year marked the tenth anniversary of Preservation Week®, a public awareness initiative that aims to promote preservation and conservation in communities with the help of libraries, institutions, and museums. This year's theme was "Preserving Oral History," and author, activist and cultural critic Roxane Gay was the honorary chair. This theme offered the public the opportunity to explore oral histories both as acts of preservation and as artifacts that require preservation. Libraries, institutions, and museums held virtual events April 26-May 2, and ALCTS hosted the free Preservation Week webinars "Using Oral History to Tell Your Family Stories" and "Community Archiving Strategies for Oral History" during the week. Preservation Week is a collaborative effort supported by ALCTS, the Library of Congress, and the Institute of Museum and Library Services.

ALCTS Publications

From September 1 to June 8, 2020, *ALCTS News* published nine feature articles, six columns, and ten announcements (some articles are categorized as more than one item.) Chelcie Rowell continued to post conference reports to ALAIR. The monthly electronic newsletter *ALCTS Connect* moved from monthly to being sent every other month. The January/February *ALCTS Connect* was sent in early February and the March/April *ALCTS Connect* was sent in early April. The average open rate was 30 percent.

From January 1 to May 31, 2020, thirteen papers were submitted for publication in *Library Resources and Technical Services* (*LRTS*) journal, an increase from the eight papers submitted for the period of January 1 to June 1, 2019. Two papers were published, three rejected, and the others are in various stages of review. A total of thirty-two papers were submitted during 2019. Because of the pandemic, the search committee for the *LRTS* Editor position decided to suspend the search and extend terms for the journal's current editors for an additional year. Current *LRTS* Editor Mary Beth Weber and current *LRTS* Book Review Editor Elyssa Gould will continue in those roles through December 2021. As of April 2020, *LRTS* has 137 subscribers.

Three ALCTS monographs were published in 2020—*Linked Data for the Perplexed Librarian*, *The Library's Guide to Graphic Novels*, and *The Library Liaison's Training Guide to Collection Management*. The second guide in the ALCTS Monographs Sudden Position Series, the *Sudden Position Guide to Collection Management*, and the Sudden Selector's Guide series guides *Sudden Selector's Guide to Geography and GIS* and *Sudden Selector's Guide to Romance Languages and Literatures*, were also published in 2020. Comprising members from both academic and public libraries and one member from the Library of Congress, the ALCTS Monographs Editorial Board provides ALCTS members an opportunity to serve as board members and provides an opportunity for ALCTS members to publish. The Board is currently developing a proposal for a monograph covering diversity and inclusiveness.

ALCTS Publications Committee members will be reaching out to Exchange virtual conference presenters about writing for ALCTS. Members of the committee are looking forward to offering their expertise in working with ALCTS publications to contribute to designing a plan for publications within the new division and its new sections.

ALCTS Leadership Development/ Mentoring Program

The ALCTS Mentoring Subcommittee spent the year supporting the program's third cohort of twenty-eight mentor/mentee pairs, which ended on April 30, 2020. The subcommittee also reviewed applications for the fourth cohort and matched mentors with mentees for a total of thirty-one pairs whose mentorships began in June 2020. In collaboration with the LLAMA Mentoring Committee, participation in this year's mentoring program was opened to current members of ALCTS, LLAMA, and LITA, and applications were received from members across all three divisions. The ALCTS Leadership Development Committee continued the development of a LibGuide as a resource for ALCTS leaders and delivered a webinar on virtual meeting best practices for ALCTS leaders to support the ALCTS strategic goal to increase virtual participation in events.

ALCTS Standards Development Activities

With the approval of Core, the ALCTS Standards Committee proactively began brainstorming a new charge to incorporate the new division's mission plus other standards committees, and identified the CRS Standards Committee as one such committee with which to merge. Prior to the 2019 ALA Annual Conference and 2020 Midwinter Meeting, the committee distributed a list of standards-related ALCTS programming to a variety of discussion lists that will also be posted on its LibGuide.

The Metadata Standards Committee held monthly online meetings to continue working on the Assessing Metadata Framework. The Framework is a rubric used to determine the quality of a metadata standard for a given project. The committee wrote an executive summary to accompany the Framework, and sought feedback from the community during ALA Midwinter.

Joelen Pastva began her role as the new ALA representative to National Information Standards Organization (NISO). Other ALCTS Committees within the Cataloging and Metadata Management Section (CaMMS) continued their work to discuss and provide input into metadata-related standards. The Committee on Cataloging: Description and Access (CC:DA) contributed to the revision of *RDA: Resource Description and Access*. Stephen Hearn and Dominique Bourassa, ALA's two representatives to NARDAC (North American RDA Advisory Committee) continued to collaborate with CC:DA to obtain input into revisions to the RDA Toolkit as part of the 3R Project, which is in its final stages. The Subject Analysis Committee (SAC) studied and made recommendations related to a variety of subject and genre/form vocabularies used to organize information, including discussing possible alternatives to the use of the Library of Congress Subject Heading "Illegal aliens". Since the Midwinter Meeting, SAC's Subcommittee on Faceted Vocabularies completed their "Best Practices for Faceted Chronological Data" and the "Illegal aliens" working group completed their report and started developing a website to house accompanying documents.

Advocacy

The ALCTS Advocacy and Policy Committee received reports from liaisons to ALA's Committee on Library Advocacy (COLA) and the ALA Committee on Legislation. The chair took ALA Bystander Training in September and shared notes from that class. The committee discussed updates on Core and possible future work, such as developing statements of value for generic technical services positions. Committee members also recommended that CORE have a seat on the ALA Advocacy Committee, and identified the need for a group that advocates specifically for technical services staff within ALA and libraries.

Organizational Changes

Transitioning from ALCTS to Core

During this transitional year, much of the focus of ALCTS leaders and staff was on planning for the possible creation of a new division with LITA and LLAMA. Throughout Fall 2019, a revised Steering Committee and new project teams agreed on the new name for the proposed division and worked through all operational aspects of the new division. A Communications Working Group developed and implemented an intense member communication campaign, including in-person and virtual town halls, focus groups, surveys, and countless updates through email, social media, and a new website. In December, the final project plan was shared with members, including the proposed bylaws. Throughout the spring, communication continued, and each division held a final set of virtual town halls. In the spring election, ninety-one percent of ALCTS members who voted supported the creation of Core, and the other division members also overwhelmingly voted to support Core—with ninety-six percent yes for both divisions.

In May, new working groups were launched to lead the transition, with the remainder of the summer devoted to winding down ALCTS and planning for Core. The final reports of these groups were submitted in early August. A virtual celebration attended by members of ALCTS, LITA, and LLAMA took place at the conclusion of the Virtual ALA Annual.

ALCTS Finances

A variety of factors converged during the early months of 2020 to complicate ALCTS's financial situation. The overall ALA budget situation worsened in FY20. At the ALA Midwinter Meeting in Philadelphia, ALA announced that much of its cash and short-term reserves, including those reserves built up by the divisions, had been used to cover operating deficits, and that cash flow to pay bills remained a concern. ALA applied for and received some relief under the Payroll Protection Program, but with even lower revenue due to COVID-19, the deficit increased, and staff were informed that they would be required to take one week of furlough in August 2020 and five weeks of furlough throughout FY21.

ALA's budget situation worsened considerably again due to COVID-19 and the resulting cancellation of the in-person ALA Annual Conference. This situation prompted ALCTS to co-sign a letter with ALA member divisions the

Association of College & Research Libraries (ACRL), the Association for Library Service to Children (ALSC), the Public Library Association (PLA), LITA, LLAMA, and the Reference & User Services Association (RUSA) that was sent to the ALA Executive Board requesting more information about how ALA planned to address this situation and expressing concern for the well-being of ALA staff given the planned furloughs. With a signification portion of the ALA accounting function transferred to an overseas firm, ALCTS staff were unable to access financial reports for up to six months due to COVID-19, making it impossible to report on the state of ALCTS finances as ALCTS wound down its activities. Once the results of the member votes to create Core were announced in April, ALCTS leaders and staff focused on planning for the financial sustainability of the new division within the context of ALCTS's relatively strong financial situation prior to ALA's overall financial difficulties.

ALA and COVID-19

ALA staff began to work from home in March 2020 as a result of the COVID-19 pandemic. Even while working remotely, staff continued to provide webinars, repurposed Annual Conference programming for virtual presentations in the fall, and planned for the Core launch on September 1.

ALA's move to a new office in April was delayed until June due to COVID-19. In May, ALCTS staff packed the old office area, and most of the move was completed by early June. ALA had scheduled the official return to the office date for September 8, however, after reassessing the return plans, and evaluating the handling of the pandemic in the Chicago area, ALA decided that staff would remain working remotely through 2020. Although Core staff was unable to start as a new division on-site in the new ALA headquarters, they have been diligently working together and with members of the new division, and have begun the tasks of building this new organization within ALA.

Moving Forward

As ALCTS Past President, I would like to express my appreciation to my colleagues on the ALCTS Executive Committee (Kristin Martin, ALCTS Past President; Chris Cronin, Incoming ALCTS President; Erin Stalberg, ALCTS Councilor; Kerry Ward, ALCTS Interim Executive Director; and Julie Reese, ALCTS Deputy Director) and to the entire ALCTS Board for their support this past year, their service to ALCTS, and their visionary leadership in supporting the transition from ALCTS to Core. Thank you as well to all ALCTS members who participated in the organization's work this year or helped to shape the future of our work in our new division. Thank you also to everyone (including the several past ALCTS Presidents) who attended the ALCTS Virtual Happy Hour in July for creating such a joyous event where we could reminisce about ALCTS while still looking forward to the future with excitement. While our future as an organization still looks uncertain in some ways, we are well positioned to make the changes that will be required in the coming years to support our profession.

Cozies, Capers, and Other Criminal Endeavors

Utilizing Taxonomies of Mystery Fiction to Improve Genre Access

Catherine Oliver

Mystery fiction has long been a genre popular with the reading public, and the development of the Library of Congress Genre/Form Terms (LCGFT) offers new opportunities for catalogers to provide access to this genre. But how does one determine which subgenre terms to use? This paper postulates that by consulting typologies of the mystery constructed by scholars and aficionados of the genre, it is possible to get a sense of how readers imagine the various types of the mystery and what subgenre terms might be useful in helping them find the type of book they desire. A common thread in the typologies considered by the author is the omission and minimizing of subgenres traditionally considered feminine, such as the cozy and the romantic suspense novel. This paper outlines some of the common criticisms and urges taxonomists not to overlook these subgenres.

"You may be wondering why I have asked you all to gather together." Such is the stereotypical end to every whodunit since the first stories in which malefactors, obeying their own version of the Sierra Club saying, take only lives and leave only footprints (and occasionally ashes from their obscure tobaccos). The detective gathers the suspects in the drawing room and leads them on a detailed journey from bafflement to enlightenment, accusing various persons before finally wringing a confession from the guilty party.

The author's goal in writing this paper was to study how the mystery novel has traditionally been treated in the library cataloging practices and scholarly typologies used to create a taxonomy of the genre. This is an exciting time in fiction cataloging. The first list of Library of Congress Genre/Form Terms (LCGFT), a vocabulary that aims to make discovery of materials by genre possible, was recently published, and catalogers have been encouraged to submit new terms as needed. This paper aims to suggest new methods for creating comprehensive and usable genre headings.

Literature Review

Libraries have not always been hospitable to fiction. In the eighteenth and early nineteenth centuries, library access to imaginative literature in the United States was extremely limited; moral and intellectual objections to the novel meant that

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most libraries, especially those open to the general public, either forbade it or deliberately limited their collections. The formation of the American public library system fundamentally altered this state of affairs. Ticknor, in his report to the Boston Public Library, specifically recommended that libraries "[follow] the popular taste- unless it should ask for something unhealthy."[1] What that meant in practice was that, in the late nineteenth-century public library, the reading of fiction was tolerated but not encouraged. Very few libraries actually banned imaginative literature outright; however, various shelving and circulation policies were adopted to dissuade patrons from reading novels, or, at any rate, too many novels.[2]

As the nineteenth century neared its end, prejudice against fiction as a literary type began to ebb. Indeed, sixteen percent of the works on the recommended book-purchase list provided by the American Library Association (ALA) in 1893 were fictional titles.[3] Next came battles about what was then termed "light fiction": its worth and its morals. Mystery fiction as a genre was always complicated. For example, Gaboriau's stories about Lecoq of the Sûreté (one of the first fictional police detectives) were condemned in 1882 by the Young Men's Association of Buffalo, but were recommended in the second edition of Perkins's *Best Reading*, published in 1887.[4] ALA included Wilkie Collins on a questionnaire about authors whose works might be subject to challenge on "sensational or immoral grounds," only to discover that all of the responding libraries had Collins's books on their shelves and none had received a complaint.[5] By the twentieth century, librarians had come to terms with the presence of light fiction, including genre fiction, in their libraries (although some still lodged objections against mysteries that glamorized criminals, such as Hornung's *The Amateur Cracksman*); however, there were still attempts to limit the amount of genre fiction purchased.[6] The situation changed after World War I. A new generation of librarians believed in giving the public what it wanted rather than acting as educators and censors, and fiction entered the library en masse.[7] Today, as Haycraft and Symons pointed out in histories of the genre published nearly twenty years apart, the mystery novel is an important part of library collections.[8]

Discoverability of Mysteries in the Catalog

But the question then arises: how is a reader to find all the mysteries that have been purchased? They could be shelved in a separate section, and many libraries, especially public libraries, follow this practice. However, that solution is not very practicable for an academic or research library, where literatures are traditionally placed in the contexts of place, time, and language, and any attempt to unmoor and separate the genre fiction would result in an incomplete picture of each nationality's culture. If physical collocation is not possible, then intellectual collocation, through the catalog, is a library's traditional next step. However, an examination of the history and present of fiction cataloging indicates that there are issues that need to be resolved before mysteries can be truly accessible to patrons. In particular, how the question of access to fiction by genre and subgenre has been handled must be examined.

Fiction has traditionally been cataloged much more austerely than nonfiction in American libraries. For many years, the standard practice was to provide only two access points for an individual work of fiction: title and author, with subject access points allowed only under certain limited circumstances.[9] Genre subject access (the expression of a work's "isness") and topical subject access (the expression of a work's "aboutness") were both lacking; indeed, are still lacking, since the bibliographic records that catalogers create live after they and their standards retire, with the result that even the most modern Library Services Platform (LSP) contains any number of basic records for fictional works.

Indexing Fiction

Over the years, several library theorists advocated for more access points for fiction, particularly for genre access points. The most famous was perhaps Charles Ammi Cutter, who wrote in his *Rules for a Dictionary Catalog*, "It would be convenient to have full lists of the single works in the library in all the various kinds of literature, and when space can be afforded [in the catalog] they ought to be given."[10] He made a clear differentiation between genre and topic: "Under the names of certain subjects we give lists of the authors who have treated of those subjects; under the names of certain kinds of literature we give lists of the authors who have written books in those forms; the cases are parallel."[11] In describing genre, Cutter cited such examples as "Historical fiction," "Sea stories," and "Religious novels;" he made it clear that such specific terms should only be applied to collections of works, not to individual works, because "it would be very difficult to do so and of little use"—he suggested using only Fiction, Poetry, and Drama, subdivided by country of origin, as genre terms.[12]

Despite Cutter's belief that it would be impracticable to index fictional works by specific genre or topic, there were several calls in the early twentieth century for fiction indices.[13] The most ambitious project was initiated by John Thomson, chief librarian of the Free Library of Philadelphia, in 1901; on his recommendation, a task force was formed to create a sample controlled vocabulary and then to classify the books at the library's Wagner Institute Branch.[14] This classification was published in 1903; the introduction stated that the authors' intent was to "recommend the

formation of a committee to continue the work and to issue, not later than 1905, a classified and annotated list of the best ten thousand novels written in, or translated into, the English language and published prior to 1903."[15] Despite lobbying by Thomson and others, however, ALA decided not to authorize the creation of a union fiction index, citing lack of need.[16]

Thomson's endeavor was criticized at the time from many sides. There were those who argued that the creation of a fiction index was demeaning to fiction because it was an attempt to justify its existence in the library collection by emphasizing its topical aspects.[17] Others claimed that fiction did not require detailed subject cataloging because it was essentially ephemeral.[18] Both sides opposed using cataloger time for subject analysis of fictional works, but for opposite reasons. With concerted opposition from such disparate camps, it is not surprising that for nearly ninety years, fiction was cataloged using only name and title access points.

Most influential in the world of fiction cataloging was undoubtedly the issuance of the *Subject Cataloging Manual: Subject Headings* (henceforward the *Subject Headings Manual*) by LC in 1984. It had its beginnings as the library's internal best practices for its own catalogers, but was published to assist others in following its procedures.[19] In the section on cataloging fiction, H 1790, the *Manual* instructs catalogers not to assign topical subject headings to individual works of fiction, with exceptions made only for biographical fiction, historical fiction (if the historical period was an essential element of the plot), and fiction that concerns animals in general and particular types of animals; individual works of fiction are not to be assigned genre/form subject headings.[20] Collections of fictional works, however, can be assigned topical and genre/form subject headings, both to be taken from the same vocabulary: the Library of Congress Subject Headings (LCSH). To avoid confusion between topical subject headings and genre/form subject headings for collections of works, LC policy is to use the subdivision "History and criticism" after the heading for works about a specific genre.[21] A book comprising several mystery novels would be assigned the heading "Detective and mystery stories," while a book about mystery novels would be assigned "Detective and mystery stories—History and criticism."

Differentiation between topical subject access and genre subject access was not a particularly contentious issue in the card environment; however, the development of the online public access catalog provided new avenues for discovery. LC began trying to determine how to encode genre and form in Machine-Readable Cataloging (MARC) format in the 1970s; the two were originally two separate fields, with genre (which describes material content) in the 655, one of the subject fields, and form (which describes material type) in the 755, an added-entry field. That practice was discontinued by the 1990s, owing to confusion in practice when it came to differentiating the two concepts, and the two were combined into the 655 field.[22] The development of a specified field for genre and form access points in the MARC record meant that they could be indexed separately from topical subjects and thus accessed separately, allowing patrons for the first time to do specific searches for particular types of literature and for works about particular types of literature.

In 1990, the Association for Library Collections and Technical Services (ALCTS), an ALA division, approved the Cataloging and Classification Section Subject Access Committee's *Guidelines for Subject Access to Individual Works of Fiction, Drama, etc.*[23] When the *Guidelines* were published later that same year, they "[recommended] the provision of four kinds of subject access: form/genre access, access for characters or groups of characters, access for setting, and topical access."[24] The first part of the *Guidelines* comprised the recommendations on form/genre headings, including a thesaurus of form/genre terms to be used in the 655 field; the *Guidelines* placed no restrictions on use of the headings, instructing only to "[a]ssign as many form/genre headings as appropriate."[25]

Reaction to the *Guidelines* was mixed. The OCLC/LC Fiction Project was created by eight libraries to enhance existing bibliographic records with topical and genre subject access points taken from the *Guidelines*.[26] However, there was also criticism. One detractor was librarian Steven Olderr, editor of *Olderr's Fiction Index*, who expressed "hope" that LC would adopt the basic principles of the *Guidelines*, but criticized the genre/form thesaurus proposed.[27] The substance of his criticisms are discussed later in this paper. In 1991, he published his own subject and genre vocabulary for cataloging fiction, *Olderr's Fiction Subject Headings*, which he developed to "supplement and explain the LCSH so that the subject headings therein may be used with works of fiction."[28]

A second edition of the *Guidelines* was published in 2000, with some terms modified and more explicit instructions on assigning headings. The instructions on cataloging fiction were eventually incorporated into the *Subject Headings Manual* in 2001 as "Special Provisions for Increased Subject Access to Fiction" (with the important change that LC recommended assigning "no more than one or two genre headings"), but the thesaurus never seems to have been incorporated into standard cataloging practice.[29] As a result, many catalogers, although they followed the *Subject Headings Manual* instructions on enhanced access to fiction, continued to use LCSH as genre terms and followed the old guidelines on using free-floating subdivisions to make it clear in the catalog display which works were examples of a genre and which were about a genre.

In 2010, LC's Policy and Standards Division (PSD)

announced that it was "[planning] to formally separate genre/form terms from LCSH, in both MARC records and in printed products."[30] LC had in fact been working intensively on genre/form terms for a variety of fields, including motion pictures, sound recordings, and cartographic materials, since 2007; however, these new terms were being added to the topical LCSH vocabulary.[31] Now, for the first time, LC was planning to create its own thesaurus of genre/form terms. The PSD also announced in 2010 that this new vocabulary would be called the Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT).[32]

Genre terms for literature were an area of need identified by the PSD in its initial decision, and subsequently the ALCTS Subject Access Committee Subcommittee on Genre/Form Implementation formed a working group for LCGFT literature terms. The group first met at the 2012 ALA Annual Conference in Anaheim and began with examining the existing LCSH for possible genre/form terms to create a tentative list of terms.[33] In May 2015, LC approved 125 literature genre/form terms for use in cataloging.[34]

A draft of the *Library of Congress Genre/Form Terms Manual* was posted online in January 2016 for review and provided instructions for catalogers on applying the new vocabulary to bibliographic records.[35] As in LCSH and other vocabularies, there are instructions to assign terms "only as they come readily to mind after a superficial review of the material being cataloged."[36] Terms should be as specific as possible (which, for a general resource or a resource containing many disparate resources, may not be that specific); in a break from the *Subject Headings Manual* (but in accordance with the *Guidelines*), catalogers are encouraged to add as many genre/form terms as necessary.[37] Another break from tradition is that catalogers were encouraged to use their judgement as to what genre a work represents, even if the work identifies itself in the title as being of another genre (important if one considers how many mystery novels have as their subtitles simply *A Mystery*).[38] Catalogers with special expertise in poetry are encouraged to use their knowledge to assign the most specific genre/form heading possible; it is not unreasonable to extrapolate that eventually, catalogers with other specific literary knowledge will also be asked to be similarly specific about materials in their fields of interest.[39] The LCGFT can be seen as evidence that the concept of genre access is finally attracting acceptance from the library community.

An examination of these library vocabularies reveals both striking similarities and a multitude of differences. To start with the first and most basic example, in the Free Library of Philadelphia's *Fiction Classification*, the fictional works with topics that corresponded to those in the Dewey Decimal Classification scheme were arranged according to that system, while "to the residue, containing, of course, a great number of the best of all works of fiction, where thought desirable or helpful to readers and students, supplementary headings have been assigned, in the form of a descriptive note."[40] One of the supplementary headings present was "Detective tales"; sixty-eight books were thus classed.[41] Unfortunately, due to format limitations (a printed catalog), each book could only receive one topical or supplementary heading.

Controlled Vocabularies

It is important to remember that the LCSH is not intended as a comprehensive survey of human knowledge, but simply one of published human knowledge, Each heading must be justified by what catalogers term "literary warrant" (i.e., someone has created a work about that topic). However, it should be noted that even if literary warrant for a topic exists, it does not guarantee that a member of the Subject Authority Cooperative Program (SACO) will suggest it as a subject heading.

The LCSH heading for mystery fiction is "Detective and mystery stories." It is one of many terms entered under the broader term "Fiction." Also included as child terms for "Fiction" are "Legal stories," "Spy stories," and "Suspense fiction," all of which LCSH defines as separate genres from mystery fiction, although, as shown below, many theorists of the genre have linked them.

Narrower terms for "Detective and mystery stories" include "Gothic fiction (Literary genre)" and "Noir fiction." Expressing the concept of the "Gothic" in a subject vocabulary is difficult because there once was an ethnic group, the Goths, who created written works. LCSH resolves the potential confusion by assigning works on literature by Goths (the ethnic group) the heading "Gothic literature." "Gothic fiction (Literary genre)" is a child of both "Detective and mystery stories" and "Suspense fiction," yet more proof that LCSH is not a true thesaurus, where each child term can only have one parent term. "Noir fiction" is a child only of "Detective and mystery stories." Note the absence of noir's antonym, cozy, a subgenre characterized by traditional structure, lighthearted perspective, and frequently comic or romantic elements. Other applicable LCSH terms include several terms for formats in which mystery fiction has appeared: "Dime novels," "Penny dreadfuls" (a narrower term for "Gothic fiction [Literary genre]"), and "Pulp literature."

The first edition of the *Guidelines for Subject Access to Individual Works of Fiction, Drama, etc.* includes multiple terms for the various genres of mystery.[42] There is no attempt made to organize them into parent and child terms, and many are marked as related to one another. Again, "Detective and mystery stories" is the preferred term, and related terms include "Ghost stories," "Horror tales," "Romantic suspense novels," and "Spy stories."

"Gothic novels" is not marked as related to "Detective and mystery stories," but is a related term for "Ghost stories," "Love stories," and "Romantic suspense novels." "Legal stories" stands alone, and is not related to any other term, and "Suspense novels" is only a SEE reference for "Adventure stories," "Detective and mystery stories," "Spy stories," and "Romantic suspense novels."

There is a great deal of inconsistency among the *Guidelines*' terms. Why do the preferred terms sometimes refer to stories, sometimes to tales, and at other times to novels? The second thing a cataloger who has experience with LCSH will notice is that the terms as provided often flatly contradict that vocabulary. For example, "Suspense fiction" is not considered a genre of its own, as it is in LCSH, and "Gothic novels" are not related to "Detective and mystery stories" in this vocabulary, whereas in LCSH they are parent and child. "Noir fiction" is not present at all.

Olderr's *Fiction Subject Headings* was influenced by what he saw as the failures of the *Guidelines*. He agreed that new topical and genre subject terms were needed to catalog fiction properly; however, he wanted his headings to correspond and interfile with LCSH to lessen patron confusion.[43] *Olderr's Fiction Subject Headings* was in fact built on the vocabulary he created for his earlier *Mystery Index*, which comingled topical and genre subject terms in its "Subject Index" section.[44] His subject headings, published four years later, are an attempt to create a taxonomy of the mystery.

Olderr's preferred term for the genre as a whole is "Detective and mystery stories," to correspond with LCSH. Surprisingly, given that his earlier work used the term "Mystery" frequently, including in its title, neither "Mysteries" nor "Mystery fiction" is given as a SEE reference. "Detective and mystery stories" is a child term of "Fiction," "Light fiction," "Adventure stories," and "Thrillers." Other genre terms included are "Detective and mystery stories, Genteel" (SEE references include "Cozy mysteries"), "Detective and mystery stories, Hard-boiled," "Detective and mystery stories, Humorous," "Detective and mystery stories, Locked room," "Detective and mystery stories, Police procedural," "Dime novels," "Gothic revival fiction," "Legal stories," "Romantic suspense fiction," "Spy stories," "Suspense fiction," and "Thrillers."

An examination of Olderr's headings makes evident his background in mystery scholarship; this is by far the most detailed library vocabulary and identifies subgenres that the "official" thesauri ignore. Amusingly, of the possible subgenres, "noir," present in LCSH, is the one Olderr misses. The hierarchy presented here, however, is unusual. Olderr does not see the subgenres as child terms of "Detective and mystery stories"; rather, he collocates them using vocabulary only, identifying broader terms for each subgenre that have their bases in the subgenre's characteristics (e.g., "Humorous fiction" for "Detective and mystery stories, Humorous"). He also perceives most of the "mystery" genres as being child terms of "Thrillers," rather than seeing them as being related terms. In Olderr's view of the mystery, all types are subgenres of the thriller, and all are equal under it.

The second edition of the *Guidelines* changed the vocabulary somewhat dramatically; various terms became better correlated with LCSH, while others moved farther apart.[45] "Detective and mystery stories" became "Mystery fiction," breaking from LCSH completely; in contrast, the term "Noir fiction" had become a child term of "Mystery fiction," to correspond with LCSH. Cozies and hard-boiled mysteries were still absent, however. "Legal stories" acquired a useful SEE term, "Courtroom fiction." "Gothic fiction" and "Romantic suspense fiction" became more encompassing, although neither has a link to "Mystery fiction." "Mystery fiction" lost its related terms: terms such as "Spy stories" and "Suspense fiction," which were SEE ALSO terms for "Detective and mystery stories" in the previous edition, are no longer connected to "Mystery fiction." However, "Spy stories" is still a SEE ALSO term for "Romantic suspense fiction."

The LCGFT that have been approved as of July 2020 include "Detective and mystery fiction" (with "Cozy mysteries," "Forensic fiction," and "Noir fiction" as narrower terms), "Gothic fiction" (not a child term of "Detective and mystery fiction"), "Legal fiction (Literature)" (presumably an offshoot of the LCSH "Legal stories"), "Spy fiction" (to correspond with the LCSH "Spy stories"), and a new term, "Thrillers (Fiction)," with "Suspense fiction" as a SEE reference.[46] None of these terms (except for the children of "Detective and mystery fiction") are marked as related. The Manual instructs catalogers to "[e]stablish a new term for definable and identifiable genres and forms for resources being cataloged, even if the library has a single instance of the genre or form," so the opportunity is present for the proposal (if not necessarily approval) of a number of literary genres and subgenres.[47]

Method

To identify some of these subgenres for the mystery, the author proposed to study existing taxonomies and typologies of the genre. Many scholars have written about the potential for improved access to fiction offered by analyzing scholarly works to find appropriate terminology, but their arguments pertained to the cataloging of individual works of fiction.[48] To the best of the author's knowledge, there are no published papers that explore the possibilities offered by the study of scholarly works about a genre to define potential terms for better access. This idea is in opposition to the traditional

theory of subject analysis, in which one begins with the work in hand and then seeks potential terms from an approved list of sources. The author has instead begun with an approved list of sources (reputed works about the mystery genre) and is seeking therein terms to use for potential future items. However, given the unusual nature of genre analysis as opposed to subject analysis, this process may reveal interesting points of access into the literature, as suggested by some of those who know the genre best, and would thus be most likely to use our catalogs and indices: the scholars themselves.

No one has yet devised a true classification of the mystery story to compare with the one of science fiction created by Croghan in his *Science Fiction and the Universe of Knowledge: The Structure of an Aesthetic Form*; his classification scheme accommodates both science fiction and fantasy works and critical literature about science fiction and fantasy works by using faceted classification numbers, with fictional works themselves organized by theme.[49] Burgess, in his *Mystery and Detective Fiction in the Library of Congress Classification Scheme*, lists LCSH and LCCN ranges currently used for mystery fiction and for the authors of mystery fiction, but does not propound any new cataloging possibilities.[50] The closest thing to a "taxonomy" of mystery fiction yet devised is that on the endpapers of Barzun and Taylor's *Catalogue of Crime*; while clearly more a jocular amuse-bouche than a serious analysis, it is still instructive to peruse for its view of the structure of the genre.[51]

Barzun and Taylor divide the crime story "phylum" into genus Detective and genus Mystery. Genus Detective is then subdivided by Species (everything from "short short [1925]" to "very long [1860]"); Varieties ("Normal," "Inverted," "Police routine," "Autobiographical," and "Acroidal"); Habitat ("Village," "Open country [moor preferred]," "Underworld [Los Angeles]"); and Temper ("Omniscient," "Humorous," "Private eye," "Official"). Genus Mystery is a bit simpler and includes the Species "Acclimated;" "Neurotic" (divided further into "Stabilized" ["'suspense,'" "Gothic," "Rebecca"] and "Aggravated" ["HIBK," "EIRF"]); and "Supernatural." Varieties of Mystery include "Chase," "Napoleon of Crime," "Mysterious East," "Domestic," "Commercial," and "International."[52]

Many of these types are quite useful in characterizing crime fiction. Length, setting, and tone are frequent considerations when selecting a mystery, and the varieties of mystery stories suggested sound familiar. Perhaps most striking is the authors' open disregard for the "women's genres" of the time, all of which are condemned as "neurotic"—although the standard-issue Gothic is seen as less dangerously ill than the female-centered story of detection then dubbed the "Had-I-But-Known" school. Barzun and Taylor were far from alone in this attitude.

Barzun and Taylor may have been unique in their structured evaluation of the genre, but in the secondary literature regarding mystery fiction, authors have often suggested their own classifications as a means of evaluating the genre (although they have rarely deemed their creations "taxonomies"). These vary from simple dichotomies to tightly-defined categories to lengthy overlapping lists of terms. The author will attempt to "classify" the classifications by identifying and examining the criteria used by each author to divide the genre into subgenres. It should be noted that some authors do not just avoid but actually protest classifying the mystery, notably Stewart, who described the process as "fascinating and futile."[53]

Analysis

The discussion will begin with what the author refers to as the *detective story-crime story dichotomy*. The earliest example in the critical literature is perhaps Freeman's article, "The Art of the Detective Story," in which he makes it quite clear that the detective story and the crime story have different aims. The crime story, he claims, is one in which the crime itself "[forms] the actual theme, and the quality aimed at is horror—crude and pungent sensationalism."[54] Its counterpart, the detective story, has as its "distinctive quality" the fact that "the satisfaction that it offers to the reader is primarily an intellectual satisfaction."[55] Freeman thus (in rather emotive terms) lays out the difference between the two: emotion and intellect, action and logic. His view was echoed in the first published book-length history of the genre, *Masters of Mystery* by Thomson, in which the story of crime is divided into "puzzle" and "sensation," with the "logical detective story . . . [recognizing] a technique."[56] This is still a common lens through which to view the mystery. In her appreciation of the genre, *Talking About Detective Fiction*, James outlined the difference between the detective story and crime fiction: the detective story has "a highly organized structure and recognized conventions," with "logical deduction" and "essential fairness" being among its main characteristics.[57]

There have been dissenters from this concept of "detective story" and "crime story" as polar opposites. In his history of the genre, *Bloody Murder*, Symons argued that rather than constituting two distinct subgenres, the "detective story" and the "crime novel" are indeed one; his position was that the detective story evolved into the crime novel as writers and readers grew bored with tales of pure detection.[58] In fact, he deplores the "rigid classifications" of crime fiction that "simply don't work in practice."[59] However, he does allow that "detective stories and crime novels are of a different strain from spy stories and thrillers," which in his view are stories of adventure rather than puzzle but still belong in the realm of "sensational literature."[60]

Symons's typology of the mystery can be conceptualized as a *taxonomy of logic*. In such a classification,

subgenres are determined based upon where they fall on the axis between logic as the essential driver of the story and action as the essential driver of the story. Seen through this lens, the detective story is the apotheosis of logic (so much that Symons argues a true one would be unreadable), while the thriller is action, in the case of the worst thrillers, action devoid of any logic (Sapper's Bulldog Drummond tales are "absurd, but undeniably have their ration of excitement").[61] The spy story, which in Symons's opinion contains more detection than the average thriller, and the crime novel, which has a greater emphasis on action or at least on emotion, would be located at midpoints along this axis.[62]

Other authors too have put forth versions of the taxonomy of logic. Wells, in her work *The Technique of the Mystery Story*, an early text on the writing of detective fiction, divides the mystery into three categories: the ghost story, the puzzle story, and the detective story.[63] In her view, although all deal with "the principle of Question and Answer," there are key differences: the ghost story takes place in a world in which there is no logic and even death has no hold; the puzzle story portrays a world in which there is a logical basis for actions, but no one to unravel the skeins of that logic; and the third, the detective story, shows a world based on logic in which a logician can triumph.[64] Murch, in her history of detective fiction, likewise separated the genre into the mystery story, in which strange happenings occur without any exercise of logic (much like Wells's puzzle story), the crime story, in which the crime itself holds the reader's attention, and the detective story, in which the goal is "to make [the reader] think."[65]

One of the central assumptions of these classifications is that the "detective story" is somehow self-evidently distinct from all other types of crime fiction, distinguishable by its logic and its artificiality. The noted mystery writer and reviewer Boucher, however, disagreed. In his essay, "What Kind of Mystery Novel Appeals Today?," Boucher wrote, "[P]ublishers, reviewers, and, above all, readers have never been especially conscious of this demarcation between the 'pure' detective story and other types of mystery-suspense novel."[66] He proposed his own set of types: the puzzle (in which the emphasis is on the mystery's intellectual aspect); the whodunit (similar to the puzzle, but with more focus on emotion and less on logic, although it should still adhere to the classic fair-play rules); the hard-boiled novel ("occasionally a puzzle, usually a whodunit, but primarily an adventure story of the violent physical exploits of a vigorous superhero"); the pursuit novel ("in which the question is not 'why?' or 'who?' but 'what will happen next?' or 'how will he get out of this?'"); and the novel "which [happens] to concern a crime."[67]

This typology, which (as seen from Boucher's descriptions) is not meant to be neatly categorized, proves when analyzed to be primarily about how much attention is given to "game" versus "character." The puzzle is entirely game, with shadow or stock characters, while the whodunit is a game but featuring characters about whom we are supposed to care (to a certain extent, anyway). A hard-boiled novel is a game in which we are meant to admire and cheer on one primary character as he battles his way towards a solution, usually without too much damage to himself but while still risking harm; while a pursuit novel would be a game in which we find ourselves identifying and empathizing with a suffering main character, thus blunting the purely intellectual pleasure of the puzzle experience. Finally, a novel would be a work purely of character with no game element.

Boucher's classification can be read as a *taxonomy of appeal*, in which the chief characteristic of each subgenre is the attraction it has for a prospective reader, rather than attempting to chart each genre on some abstract "intellect versus sensation" chart. Rodell, in her textbook of the genre, also attempts to analyze what draws readers to the form. She identifies the horror story (appealing purely to emotion), the detective story (appealing purely to logic), the adventure-mystery, of which the spy novel is an example, which "combines the appeals of the horror and the detective novels," and the mystery novel, where the focus is on the human element and the appeal is to the reader's empathy and understanding.[68] In a way, the last can also be seen as a fusion of detection and horror: analysis is married to emotion, not to excite the reader but to arouse sympathies. Rodell stresses that very few books fit neatly into these classifications; indeed, most books combine elements of all, although one type is usually strongest.[69] Other taxonomies of appeal have been advanced by Queen in *Queen's Quorum*, who in their history of the detective short story classify detective stories as "whodunits" (the earliest form, in which the question the reader wants to see answered is who committed the crime); "howdunits" (which Queen identify as beginning with the scientific sleuths whose chains of esoteric reasoning were their claims to fame—the reader wants to know how the crime is going to be solved); and "whydunits" (the then-novel psychological mystery, in which a reader's main concern is the human motivations behind the criminal actions).[70] In his bibliography, *Who Done It?*, Hagen adopts Queen's typology, modifying it slightly so that the howdunit referred not to a story where the question was how the crime was to be solved, but one where the reader wanted to know how it had been committed in the first place—the "locked-room" or "impossible-crime" mystery.[71]

Closely related to the taxonomy of appeal is the *taxonomy of tone*. Barzun and Taylor touch on this briefly in their taxonomy, but two reader's guides in particular focus on it as a primary criterion of categorization. In the *Reader's Advisory Guide to Mystery*, Charles et al. define four main tones for the mystery: cozy, soft-boiled, hard-boiled, and noir; while in *Make Mine a Mystery*, by Niebuhr, the

tones are soft-boiled (a term he prefers over cozy), traditional, hard-boiled, and historical.[72] The two classifications are very similar in their definitions of the first three terms (although the discrepancies in vocabulary are confusing), but Niebuhr's choice of "historical" instead of the natural progression to "noir" prevents them from being identical. It is probably not an accident that both authors who focus on tone as a primary classification are reference librarians, since, as Charles points out, discerning a patron's comfort level with graphic sex and violence is a key part of reader's advisory and having a descriptive vocabulary can assist in this process.[73]

Both authors also feature, overlaying their taxonomies of tone, *taxonomies of investigator*. These taxonomies attempt to define the genre by the nature of the person or organization doing the sleuthing. Niebuhr divides his sleuths into amateur, public, and private detectives and then into sub-subgenres; Charles uses the same three categories (and some of the same sub-subgenres), but includes also the historical sleuth (thus handling under investigator the same point that Niebuhr did under tone).

An earlier attempt to classify the genre by sleuth was made by Haycraft, in his history *Murder for Pleasure*. In Haycraft's perspective on the mystery, a "proper detective" is essential; he is the "most difficult and most important integer."[74] What's more, he is a he—Haycraft calls on the author to "avoid women and boys" as protagonists when possible.[75] Among Haycraft's classifications are the police detective, the amateur detective, the gentleman policeman, the consulting specialist, the retired professional, and the agency operative; each of these, according to him, represents a particular viewpoint on the detection of crime and shapes the story he headlines.[76] Haycraft was not the first to attempt a sleuth taxonomy; that would be Wodehouse, who, in an article originally published in *Punch* in 1929, describes some of the types of investigator favored by the writers of his day. Wodehouse was not particularly fond of any of the amateur detective types, although he stated a preference for the "curt, hawk-faced, amateur investigators" over the eccentric and prim "dry detective," the scientific wizard "dull detective," and his least favorite, the "effervescent detective." "Violence to the person cannot dampen Tony's spirits, provided it is to some other person. Viewing the body brings out all that is gayest and sprightliest in him."[77] Wodehouse recommends the police detective as protagonist, pointing out the advantages of having fingerprint departments and cordons at one's disposal.[78]

Finally, there are *taxonomies of gender*, which focus on the subgenres as gendered entities and analyze them on that basis. In his study of the mystery, *Foul & Fair Play*, Roth argues that the mystery genre is inherently a masculine one: "[m]y controlling assumption is that gender is genre and genre is male."[79] He divides the mystery into three categories of analytic (that is, the traditional detective story), hard-boiled, and spy thriller; what differentiates his taxonomy from the taxonomy of logic (which it outwardly resembles) is his emphasis on the maleness of each of these genres. While allowing that the detective story has been written by women and often features female characters, Roth argues that "analytic detective fiction has *officially* [emphasis Roth's] forbidden women to enter its pages as sexual presence," while his views on the hard-boiled story ("written against women") and the spy thriller ("women are…avoided") are even stronger.[80] In Roth's opinion, the mystery is itself so gendered that all subgenres fall in line.

Stasio takes a different approach. In her paper "A Sweep Through the Subgenres," she states that there are four female-dominated subgenres: the village mystery; the historical mystery; the puzzle mystery; and the suspense mystery, all of which are now considered, per Stasio, "old-fashioned and stodgy."[81] The village mystery, according to her, is most analogous to what other authors have termed the cozy, a term that Stasio finds condescending: "you will actually find those patronizing quotation marks used to denigrate village mysteries- the 'cozy mystery,' the 'teacup mystery,' the cottage mystery' are probably familiar terminology."[82] She believed that such terms denigrate this type of mystery by reducing it to a pastoral anachronism, ignoring its power. Furthermore, she argued that the historical mystery is overmuch associated with women and romance and that the puzzle mystery, which she considers a female genre because of its logic and its strong female heritage, is "dying out."[83] Lastly, she considers the domestic suspense novel (a term under which she gathers the Gothic, the romantic suspense, and the suspense novels focused on women's sphere written by such authors as Fremlin and Highsmith), emphasizing the emotional and intellectual qualities of these books.[84] In Stasio's overview, the mystery itself is not an overtly gendered field; however, female subgenres do exist and those are more likely to die out and to be undervalued by critics and the public alike.

Consideration of the Roth and Stasio arguments leads one to examine the evidence of gender in the other works analyzed in this paper. One notable aspect of all these subject vocabularies and taxonomies is the extent to which certain subgenres are negated, minimized, or confused. These tend to be those subgenres traditionally read as feminized: the cozy and the Gothic/romantic suspense. Their absences or incomplete presences in our classifications of mystery fiction make discovery and scholarship more difficult than is necessary.

How are these subgenres feminized? Much of the time it is, as Stasio argues, by use of coded terminology. We have seen certain subgenres named as "cozy" (LCGFT), "genteel" (Olderr in his *Fiction Subject Headings*), "soft-boiled" (Niebuhr), and even "neurotic" (Barzun and Taylor). These

are adjectives that are feminized in contemporary discourse, and all carry certain negative connotations. Some authors argue directly that there are male and female subgenres, and that these subgenres are destined to be forever in conflict, taking their places in an undisguised battle of the sexes: "What else is the difference between Christie's Orient Express and Chandler's mean streets but a clash between a traditional female sensibility and its male counterpart?...[t]he hard-boiled animus towards the traditional mystery would seem to go hand-in-hand with a violent distrust of the feminine."[85] Even more directly, in a piece in Winn's guide to the genre, *Murder Ink*, authors Stasio and Hummler depict the conflict between cozy fans and hard-boiled aficionados as a heterosexual couple sparring over the breakfast table.[86]

Not only is this subgenre conflict portrayed as a battle, it has also been described as a battle with a winner. In his overview of genre history, after making the argument that the private-eye works of Hammett and Chandler brought realism and characterization to the mystery, Cassiday states, "Hammett and Chandler had kept the detective and thrown out the fripperies of the old-manse murder and the had-I-but-known school."[87] He later explains the tremendous success of Spillane as follows: "[M]illions of men…had lived for years [during World War II] in mud and filth, next to blood and death, hoping to survive. They were not interested in the unrealities of country homes and terrified maidens. They wanted blood and sex."[88]

Leaving aside the fact that the private-eye genre in print and on film is often as stylized as the body-in-the-library-no-footprints-in-the-snow cozy, and that just as very few people actually plan "impossible crimes," so too do very few people routinely machine-gun Soviet agents as they torture naked brunettes, this reading of male subgenres as "real" and female subgenres as "false" is a very revealing one. Cassiday describes a crime-fiction history where masculine books (hard-boiled) and feminine books (cozy, romantic suspense), which he describes as "two diametrically opposed types of literature…both labeled as detective novels," coexist not-so-peaceably together until the masculine books begin to dominate thanks to "millions of [men's]" lack of interest in the problems of "terrified maidens."[89] This version of events essentially erases female readers from the narrative as it argues that one gender's lies are truer than another gender's lies.

It is important to note that while these genres tend to be read as gendered, that is not a universal truism. Men have written cozies (Alexander McCall Smith, currently a best-selling cozy novelist, for example), and great noir has been written by women, most famously Highsmith's series about sociopath par excellence Tom Ripley.[90] Even the most stereotypically female genres have had their male fans. In *Northanger Abbey*, Henry Tilney tells Catherine Morland that, contrary to her beliefs about masculine reading habits, he loves a good Gothic novel; Henry "[has] read all Mrs. Radcliffe's works, and most of them with great pleasure" and that "when [he] had once begun [*The Mysteries of Udolpho*], [he] could not lay [it] down again.[91] Many years after Henry Tilney, the most popular author in the battlefield libraries set up by ALA for servicemen during World War I was in fact Mary Roberts Rinehart, queen of romantic suspense and founder of the Had-I-But-Known school (about which more later).[92]

The question arises: how do we define these feminized subgenres? First, let us look at the cozy mystery, most descriptions of which follow one of three patterns. Olderr, in his scope note for "Detective and mystery stories, Genteel," describes the subgenre as "characterized by an absence of explicit violence, sex, or language" —it is a negative subgenre, defined by what it lacks.[93] The LCGFT "Cozy mysteries" (which was not adopted until November 18, 2019) has the scope note "Mystery fiction that features amateur sleuths, socially intimate settings, and a lighthearted tone," while in the *Oxford Companion to Crime and Mystery Writing*, the cozy is described by Oleksiw as "defined by its light tone, element of fun, and closed world;" this is the cozy as the happy subgenre, as represented in series about the bakery/knitting shop/library where community is key, women are valued, and there is at least one available man.[94] The third viewpoint, advanced most vividly in Auden's essay "The Guilty Vicarage," is of the cozy as ordered and moral universe, in which "the job of detective is to restore the state of grace in which the aesthetic and the ethical are as one."[95] Part of the difficulty of defining the cozy is the need to manage all three expectations at once.

The second "feminized" subgenre is the Gothic. What is a Gothic, and how does it relate to the romantic suspense novel and the 'Had-I-But-Known' novel, with which it is often conflated? In a piece for *Murderess Ink*, Tracy states that the word "'Gothic' as a critical term [is] spectacularly unmanageable."[96] Westlake, in contrast, simplifies it to its extreme: "A Gothic is a story about a girl who gets a house."[97] The genre broadly known as Gothic fiction has a long tradition dating back to Walpole, Radcliffe, and other eighteenth-century purveyors of supernatural dread. The question is, what relationship do these modern Gothics have to the classic tradition? Slung claims that the modern Gothic novel is a direct descendant of *The Castle of Otranto*, with romantic suspense as a later iteration of the same basic theme.[98] Whitney, however, argued that the term "Gothic" was a marketing ploy designed to frame a new genre, romantic suspense, as an old one; according to her, romantic suspense novels did not become a publishing phenomenon until "1960, [when] one softcover editor, starting a romantic suspense series, called his books 'gothics' and lightning struck;" Whitney contends that she still

prefers the term "romantic suspense" as a descriptor for her books.[99]

Another term that frequently comes up in discussions of the Gothic/romantic suspense genre from a historical standpoint is the "Had-I-But-Known" novel. This is one of those rare subgenre terms that was invented not by writers or fans but critics: one particular critic, the poet Ogden Nash. In a poem entitled "Don't Guess, Let Me Tell You," Nash opines that, "The H.I.B.K. being a device to which too many detective-story writers are prone/Namely, the Had I But Known."[100] The expression caught on, and it is difficult to find a critical work about the mystery that has anything positive to say about this type of romantic-suspense novel, which, as the term implies, features a female narrator/sleuth who recalls a mystery she has solved while lamenting the fact that it happened, that she did not solve it sooner, and that she was not at the time aware of the importance of certain pieces of evidence that later proved vital. "Had I but known then what I know now, I would never have gone to that house/asked that question/concealed that piece of embroidery…" Haycraft devoted two pages and a lengthy footnote to excoriating the school, and Barzun and Taylor, while condemning the entire subgenre as neurotic, saw the Had-I-But-Known as "aggravated," while the Gothic/romantic suspense was "stabilized" —that is, the Gothic/romantic suspense is at least controlled and docile, while the Had-I-But-Known is extreme.[101]

Why all this venom? It cannot be mere irritation at the cliché of the protagonist reflecting on past adventures; for that is essentially how Ambler's *The Mask of Dimitrios* (one of Haycraft's "Cornerstones") begins. Had-I-But-Known protagonists do not share their discoveries promptly with the police, but neither does the main character in Milne's *The Red House Mystery* (another of Haycraft's "Cornerstones"). They vary wildly in the quality of their writing, but that is true of all mysteries. In her essay, Maio makes the case that the Had-I-But-Known is a "Gothic-detective hybrid" featuring logical reasoning but with no certainty of a logical universe.[102] Unlike her sister in the Gothic mansion, the Had-I-But-Known heroine is active rather than passive in meeting her demons; to quote Maio, "romantic suspense is a celebration of women's submissiveness instead of women's strength," while the Had-I-But-Known heroine is, by her very title, a survivor.[103] The Had-I-But-Known may have been a little too prescient for the times. To sum up with Tracy on how to distinguish the subgenres:

> [T]here is a last-ditch test for genre: ask yourself what the heroine will find behind the black curtain (in the secret passage/in the trunk/in the attic). A waxwork body in a state of waxwork putrefaction, with waxwork worms? This is a Gothic find, manufactured in days of yore as a reminder of human mortality and doing its job once again. A costume worn earlier by a pseudo-phantom? The damsel has confirmed her own sensible conclusions and can move three squares nearer the happy ending. A yellowing snapshot of the villain as butler? O God, Had She But Known![104]

As noted, the crime-genre is a varied and capacious one, which holds the adventures of policemen as varied as Roderick Alleyn and Virgil Tibbs, which accommodates private detectives as dissimilar as Sam Spade and Hercule Poirot, and which features amateur detectives as archetypical as Miss Marple and as unusual as Donna Andrews' Turing Hopper, a sentient computer program. Fighting the forces of law are likeable rogues (Allen's Colonel Clay in *An African Millionaire*), likeable burglars (Block's Bernie Rhodenbarr), likeable getaway drivers (Westlake's Stan Murch), likeable secret policemen (Akunin's Erast Fandorin), and even likeable murderers, as well as other deeply unlikeable human beings. Given the immense diversity of the genre, it makes sense to consider broadening the view of possible subgenre terms to ensure that all mystery buffs are able to find the books that best fit their reading desires.

MacLeod's novel *Rest You Merry* is an example. It features a murder in a locked room (of a librarian, of course) that takes place over Christmas in the home of a college professor and is written by one of the foremost practitioners of the cozy in the 1980s. There are so many subgenre terms one could assign to this work, based on the taxonomies above. Howdunits or locked-room mysteries? Cozies? Humorous mysteries? Amateur detectives? Women's mysteries? Or—to use terms from other lists that the author has seen—academic mysteries? Bibliomysteries? Christmas mysteries?

Conclusion

Most mysteries conclude with the answer to the question "Who done it?," and as the author has learned, the answer is, "A great many thinkers and writers, working individually and together." There is still work to be done on improving access to all library resources. "Who will do it?" The author hopes that the answer is the library community, the literary community, and the community of readers who contribute to our work through tagging and annotating. As a certain famous mystery novel taught us, we are much more likely to get away with murder when we work in groups.

The author recommends that catalogers with time and interest follow that example (in an allegorical sense) by studying critical analyses of the literary genres they most frequently analyze to see how scholars in those areas have defined the most common subgenres. As was demonstrated

above, these scholars are not immune to the prejudices of their societies, so attention should be paid to racist, sexist, and other biases displayed so these are not mirrored in the controlled vocabularies catalogers use. Catalogers should also be proactive about assigning genre headings to works to improve access and be proactive about submitting new genre headings to the LCGFT. "Locked-room mysteries," which is a popular mystery subgenre that is easy to identify (frequently highlighted on jacket or back-of-book copy) and has been the subject of critical exploration (Adey's bibliography of locked-room mysteries is a good resource for finding those already published for retroactive catalog enhancement), is a good candidate.[105] The potential for assisting patrons in finding new and exciting crimes (and other fictional works) is unlimited.

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A Reconsideration of Library Treatment of Ethically Questionable Medical Texts

The Case of *The Pernkopf Atlas of Anatomy*

Laurel Scheinfeld, Jamie Saragossi, and Kathleen Kasten-Mutkus

The Pernkopf Atlas of Anatomy *consists of anatomical drawings created by Austrian physician Eduard Pernkopf, an active member of the Nazi Party during World War II. While the book was known for its highly detailed anatomical drawings, in the 1990s it was determined that Holocaust victims were likely used as subjects for the drawings. Using a survey, the authors aimed to gather information about the presence of this monograph in academic libraries today to provide best practice recommendations for academic libraries in their approach to ethically questionable materials.*

It is not possible or even desirable for all items in a library's collection to be free of controversy. Well-developed collections contain diverse subject material that represents various points of view conditioned by different historical, cultural, and intellectual perspectives. It is also unrealistic to expect librarians who manage collections to be aware of all the controversial elements of every item in the collection or all ethical breaches committed by creators of the material. When an egregious breach of ethics has been committed during the creation of a text, and a large body of literature has been devoted to discussion of the breach, do libraries have a role to play in providing contextual information about these texts to patrons who may be unaware so they may make their own determinations about whether and how to use the resource?

The authors recently engaged in discussion about the controversies surrounding *The Atlas of Topographical and Applied Human Anatomy*, often referred to as *The Pernkopf Atlas (The Atlas)*, with a researcher at their institution. *The Atlas* is named after its creator, Eduard Pernkopf, who was an active member of the Nazi party during the Third Reich.[1] Nazi symbols are incorporated into signatures on individual illustrations in the *Atlas*. Though these facts are extremely distasteful, censorship of distasteful material is not part of the mission of libraries. What makes *The Atlas* a work of which libraries should be aware is that individuals depicted in the anatomical drawings were likely victims of the Nazi regime.[2] The disregard for both human life and informed medical

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consent has led to ongoing and evolving conversations in the medical community over whether this material, which was gathered unethically, should ever be used and under what circumstances. A recent *New York Times* article outlines a difficult decision and conversation surrounding medical ethics between a doctor and patient in Israel.[3] The patient's family was given the power to ultimately decide whether *The Atlas* should be used by the surgeon while attempting reconstructive surgery highlights the importance of shared decision making. Because of the ethical issues surrounding its production, the removal of most of the overt Nazi symbolism in later editions, and its continued status as a well-regarded resource in certain medical fields, *The Pernkopf Atlas* poses an ideal use-case from which to consider and build library policies with regard to controversial materials.

The Stony Brook University Health Sciences Library owns three editions of *The Atlas* which were available in the circulating collection when Stony Brook librarians recently became aware of this resource's problematic origins. Although an official notice detailing an investigation into the book's origins was drafted over twenty years ago and sent to libraries by the University of Vienna, no evidence exists of Stony Brook having received the notification or that any changes were made in the handling of the book at Stony Brook. Berry states that, according to a summary of the final report of the University of Vienna's investigation into the matter, the information sheet was to be sent to "a representative selection of European and International libraries."[4] This research did not reveal a list of these libraries, nor a rationale for how the selections were made. Therefore, a question arose as to whether other research libraries had documentation that showed the notification had been received and if current staff are aware of it.

Along with archives and museums, libraries are often considered cultural heritage institutions. These institutions contain sensitive materials and need to make decisions on handling them in the most appropriate way. For archives and museums, mediated access is the norm and provides an opportunity for a work's historical background to be shared with patrons. And for libraries, reserves and special collections provide one method for mediated access to materials. In 1996, the National Institutes of Health's (NIH) library publicly shared that, after learning of the issue regarding *The Atlas*, they removed all editions of the book from circulation and placed them on open reserve, though no informational or educational material was attached or inserted in them. In a letter to the editor of the *NIH Record*, the chief librarian and the chair of the Library Advisory Committee stated, "We were persuaded that to mark the book with an acknowledgement of the controversy surrounding it would constitute a precedent for subjective judgment of any published work."[5] A recent, informal search of academic library catalogs revealed that *The Atlas* is widely available in circulating collections, both in health sciences libraries and general academic collections. A few libraries provided notes in their bibliographic records, providing evidence of attempts to document awareness of the controversy. However, for the vast majority of research libraries, no such note is provided for patrons. The authors wanted to learn what methods libraries have employed to document receipt of notification or to document change in location or status of the text after becoming aware of its history.

Medical information sources typically become outdated more quickly than those for other subjects, and medical librarians often deselect titles due to their age. In contrast, although the most recent edition of *The Atlas* was published almost forty years ago, this discussion remains timely because the work continues to be used. Newer anatomy atlases are available; however, some medical professionals continue to use and rely on this particular atlas due to its uniquely detailed drawings.[6] In 2017, the Vienna Protocol, which provided guidance on the continued use of *The Atlas*, was published.[7] Nerve surgeon Andrew Yee shares his recent experience making the decision to utilize *The Atlas*:

> An image from this atlas was, for this surgeon, the only anatomic drawing available to navigate the complex anatomy of the saphenous nerve in this region. There was no other surgeon available with experience in this surgical exposure, and no other accessible anatomic resource that described the exposure in adequate detail.[8]

Due to its controversial nature, there is also risk of theft or mutilation of this text, which is another important reason for libraries to be aware of it.[9] It is also important to address the potential for libraries to engage in censorship in the handling of this material by suppressing the record or removing it from the collection. The current research gathers further information about the presence and handling of this monograph at academic libraries today.

Literature Review

The scholarly literature devoted to *The Pernkopf Atlas* is interdisciplinary, appearing in journals in the fields of library science and the history of medicine. Beginning in the 1990s, scholars and practitioners began to question the composition of *The Atlas* and the possibility that its images were based on Holocaust victims. Atlas notes that Ernst published a paper in the *Annals of Internal Medicine* detailing the history of the University of Vienna in 1938 with a focus on Pernkopf's work and the ethical considerations surrounding *The Atlas*.[10] In 1996, Israel and Seidelman wrote to the editor of the *Journal of the American*

Medical Association to call for the University of Vienna to study Pernkopf's work to discover the identities of the individuals depicted in *The Atlas*.[11] These questions were partially answered in 1997 when the rector's office at the University of Vienna issued an insert entitled, "Information for Users of Pernkopf's *Atlas*," to be included with copies of *The Atlas* held in libraries.[12] Whereas this insert acknowledges the controversy, it is inconclusive regarding the identities of the individuals in *The Atlas* and how their remains were obtained. The literature surrounding *The Atlas* grapples with the ethical and historical implications of the work, its continued use, and its presence in libraries from both historical and practical perspectives.

There are two significant library case studies in the former category. Atlas conducted a survey of libraries at member institutions in the American Association of Medical Colleges to understand how these institutions had handled Pernkopf's *The Atlas*, and found that most of the sixty respondents had a copy and had relocated it to special or historical collections after learning of the controversy.[13] This survey provides important background into how medical libraries have coped with the controversy surrounding *The Atlas*. Atlas concluded his study by addressing the fact that medical libraries often lack defined policies regarding the accession and treatment of controversial or ethically questionable materials, and that these policies would both protect libraries and allow them to signal that they are not accountable for every viewpoint expressed in their collections.[14] Atlas's work differs from the current study in an important way. The survey discussed in the current paper was distributed to libraries that are members of the Association of Research Libraries (ARL), allowing the authors to query non-medical libraries as to their treatment of *The Atlas*. This is critical because of the potential scholarly interest in *The Atlas* beyond the health sciences.

In another library case study, Mages and Lohr describe a seminar for medical students in a medical humanities program, based on *The Atlas* and taught by librarians.[15] Students were asked to consider the ethical implications and how it should be treated by libraries. Interestingly, when students were surveyed at the end of the session, they voted to continue to provide access to *The Atlas*, with context, and some advocated its active promotion. This study makes a crucial contribution to the literature by highlighting library practice not just as a way of containing *The Atlas*, but to use its ethical failings and continuing controversy to invite students and researchers to consider the broader implications of medical ethics, and the need to approach all materials from an informationally literate, critically informed perspective.

Batoma considers *The Atlas* within the context of Enlightenment ideals and attempts to grapple with its ethical implications according to these principles.[16] Engaging with three positions regarding *The Atlas*—to suppress it, to keep it in use based on its value as a work without respect to its creator, and to keep it in use with notifications meant to honor victims of Naziism—Batoma considers each within a framework of Enlightenment concepts. This project provides insight into the range of perspectives taken on *The Atlas* and the implications for libraries, which are in many ways inheritors of the Enlightenment tradition with the emphasis on education, empiricism, and freedom of thought.

Morrisey engaged more directly with the library profession by examining the American Library Association's (ALA) ethical guidelines for collection development.[17] He offered concrete examples for how libraries should address the acquisition of potentially controversial content and how they should make this content accessible.[18]

Skekel takes this discourse further by exploring library ethics related to technical services and the choices and policies that condition access to library content.[19] This study makes a significant contribution to conversations regarding *The Atlas* in its consideration not only of library content, but of how libraries work within their mandate to provide access to thoughtfully handle problematic texts.

The medical literature devoted to *The Atlas* is drawn from the fields of medical history, ethics, and education.[20] The interdisciplinarity of this corpus is the result of attempts to understand *The Atlas*'s place in the history of Nazi medicine, and as an instance in the history of medical consent and research ethics. Library decisions regarding *The Atlas*, plus other texts that are similarly problematic, should be informed by this scholarly apparatus. The current study rests on this work, while applying a methodology of data gathering and the use of a survey instrument.

Method

An initial phase of data gathering included using ARL's website to identify a sample of institutions. The online catalogs for all ARL libraries (n = 124) were searched. A data capture form was established to determine: (1) if the library is a Health Sciences Library; (2) if there is a specific location listed for holdings in the library system (i.e., special collections display, storage, reference etc.); and (3) borrowing policy (if available through catalog). The libraries that were identified as holding at least one copy of *The Pernkopf Atlas* (n = 94) were added to a list of potential survey respondents. Contact information for administrators or those working directly with resource management and collection development within the library were added to the sheet for survey distribution. A survey was created using Qualtrics. This study was reviewed and exempted by the local institutional review board because there was no foreseeable risk to subjects. The survey contained fifteen questions intended to determine

Table 1. Current location of *The Atlas*

	Current Location of Holdings (*N* = 80)					
Type of Library	Circulation	Special Collection	Storage	Reference	Other	No Response
Health Sciences	9	11	10	3	0	0
Special Collection/Archive	0	12	0	0	0	0
General	7	0	4	1	0	0
Other	5	2	2	1	2	1
TOTAL	21 (26.25%)	25 (31.25%)	16 (20%)	5 (6.25%)	2 (2.5%)	1 (1.25%)

*Note that respondents were instructed to choose all that apply. Twelve responses indicated holdings in more than one location.

holdings, location, and borrowing policies of *The Pernkopf Atlas*, knowledge of the ethical concerns surrounding this text, and distribution of contextual information regarding the ethical concerns (see Appendix A to access the full survey). Each identified respondent received an email requesting participation in the survey and one follow-up email providing an extension of the survey's closing date. The survey was open for thirty-five days. Responses were collected anonymously. An opportunity to voluntarily provide contact information at the end of the survey was included for anyone interested in being contacted for further information.

Analysis

There were fifty-nine responses to the survey, constituting a 47.5 percent response rate. Six of the surveys were returned missing significant information or were unable to confirm their holdings, and thus, were not included in the analysis. Of the fifty-three libraries that positively confirmed that they hold at least one copy of *The Atlas*, twenty-two identified their collections as primarily health sciences, twelve were considered special collections and archives, ten identified as general collections, and nine responded as other types of collections (see table 1).

When possible, location changes could be used as an indication that the library was aware of the ethical concerns associated with *The Atlas*. Eleven respondents indicated that *The Atlas* had been moved from its original location in their libraries. Ten respondents reported that the text was moved from a circulating collection to special collections or storage. Six were moved due to lack of space. Of these, two were moved to storage due to a lack of shelf space. The accessibility of the copies held in storage is not specified. The responses to this question show that only eight (13.5 percent) respondents could link the location change to information surrounding the ethical considerations of the text.

Eight (13.5 percent) responding libraries confirmed receipt of the University of Vienna's letter that informed libraries about the ethical considerations when using this text. Interestingly, only three of these libraries reported moving the item due to its controversial nature. Other libraries did not respond, or did not mention that the item had been moved, though they noted that its current location was in special collections. A copy of the original letter and information sheet were offered to the authors during the course of their research. The letter is dated 1997 and was addressed to an individual who was director of the University of Buffalo's Health Sciences Library at that time. The recipient of said letter is asked to include the information sheet in copies of *The Atlas* and to share it with other libraries (see Appendix B for a copy of the letter).

To evaluate the level of usage of *The Atlas*, each respondent was asked to report the most recent activity of any holdings of the book, including circulation or review. Eleven libraries responded that their copy had circulated within the last year. One library reported circulation within the last one to two years. Fourteen libraries reported that the item had circulated two years ago or longer. Twenty-seven libraries were unable to determine when the item had last circulated, or left this response blank (see table 2).

Usage was also assessed by asking if *The Atlas* is currently being used for teaching and/or research purposes. Five institutions responded "yes," and provided descriptions of how it has been integrated into the curriculum:

> "currently being used by research faculty in the Nursing School; no more details"

> "The 3rd edition was on Reserves for students but I don't have any information about the exact class"

> "Graduate School of Biomedical Sciences—Introduction to Bioethics course uses this atlas as a case study"

> "The atlas is used in undergraduate and medical student instruction sessions when discussing issues of ethics. It has also been used in History course on Nazi Germany"

Table 2. Recent Use Summary

	Most Recent Activity with The Atlas				
	Within the Last 6 Months	6 Months–1 Year	1– 2 Years	2+ Years	Unable to Determine
Curriculum Integration	5	3	0	1	0
Not aware of Curriculum Integration	1	2	1	6	7

> "I sometimes use these atlases as part of a larger lesson in which anatomical atlases are examined with an eye towards asking questions about ethics, consent, etc. While pictures are normally allowed, I explain why I do not allow for photos to be taken of the Nazi imagery in these atlases"

The date and method of acquisition were sought to determine if awareness of the controversy, beginning in the early 1990s, led to any significant increase in acquisitions of *The Atlas* by ARL member libraries. The majority of libraries were unable to provide information on the year or method of acquisition, and therefore, a determination could not be made. Only two holdings were confirmed as being acquired after the letter was sent from the University of Vienna, and both had an undetermined method of acquisition. All five libraries that reported their holdings as donations were unable to determine the year of acquisition.

While only eight libraries could confirm receipt of the University of Vienna's letter, sixteen libraries reported that they do in fact provide some kind of contextual information with *The Atlas*. Librarian or library staff curation was the most common method of providing the contextual information, followed by including the insert with the physical item. Only three institutions reported that a note is included in the bibliographic record. One respondent reported in a free text box that several copies of *The Atlas* have gone missing over the years. This library purchased a replacement set after the first went missing. Of that set, one of three volumes is still in the library, while the other two are noted as missing. No attempt has been made to purchase additional replacement volumes, nor is there an indication given of where these items were located prior to their disappearance. Other respondents indicated the desire for the authors to share updated recommendations based on their research (see table 3).

Table 3. Methods of Providing Contextual Information to Users

Insert to accompany physical item in the collection	4
Librarian or library staff curation	8
Note in the catalog record	2
All 3 of the above	1
A binder of information in Reference	1

Findings

The Atlas is widely available in both health sciences and general collections in ARL member libraries. Usage is largely unknown. Most of the responding libraries lack evidence of receiving notification about the origins of *The Atlas*, and therefore do not provide contextual information to users.

The Atlas in library collections raises important questions related to information literacy that transcend the question of the behavior of individual libraries regarding this particular work. As Johns points out, the material form of the printed book as a commercial product, established by physical realities and market forces, underlies reader attitudes toward the text it contains. Reader response to the printed book is influenced by assumptions about how books are created and produced to convey and store information. These qualities do not inhere in the book itself, but rather are the product of the creation of "print culture" as we have come to know it and its investiture with qualities associated with printed texts.[21] For the librarian, the knowledge that people encounter materials in libraries in ways conditioned by book culture and the materials' selection for the library's collections must influence decisions about access and context. In the case of *The Atlas*, this has been achieved through notes in the bibliographic record, physical notes placed with the volumes, and the transfer of copies to special collections or other noncirculating collections. Some institutions have used *The Atlas* to address the broader issues of medical ethics and information literacy.[22] These practices speak to the fact that *The Atlas* exists as an egregious example of what is, in effect, a much broader phenomenon. No book in a library's collection is neutral; all are the result of authorial, economic, and material realities and intents plus curatorial decisions made over time. As librarians, we have the opportunity to educate our patrons about the vital importance of approaching the information they consume— both within and outside of the library—from a critically aware, informationally literate perspective.

In 2001, Atlas called on fellow librarians to alert readers to this controversial material and recommended developing a uniformly applied system to accomplish it.[23] The Vienna Protocol also encourages "making it known to one

and all just exactly what these drawings are."[24] Based on the current study, only a small fraction of libraries alert the reader about this text and the methods are not transparent or consistent. It appears that this is due to lack of awareness (as is the case at Stony Brook) rather than an informed decision. This points to either an inadequate distribution of the letter by the University of Vienna, a lack of documentation of receipt of the letter by recipient institutions, or both.[25]

Based on this analysis, the authors share several insights with implications for library practice. The authors recommend improved documentation of dates and methods of acquisition of texts plus improved documentation to track reasons for changing location or status. The inability of several of the respondents to answer questions about the history of items in their collection illuminates the need for more detailed record keeping. Indeed, egregious cases, such as *The Atlas*, illustrate gaps in library practice that hinder broader and easier access to all library collections. The ability to draw larger conclusions based on the most controversial works offers libraries the benefits of interrogating their collection management processes and assumptions. This, in turn, supports research about controversial works and their role in academic library collections with implications for scholarship, teaching, and the promotion of information literacy.

Providing contextual information to users of *The Pernkopf Atlas* is recommended to facilitate critical analysis of the text by the end users. Based on consultation with the Cataloging and Metadata Services Department at the authors' institution, a note was added to the MARC 59X field in the bibliographic record; the 59X is used for local notes. The specific text of the note chosen was selected from those used by ARL institutions in the authors' sample. The text follows:

> In 1996 this atlas and its author, Eduard Pernkopf, became the focus of a controversy in scientific ethics when it was discovered that a large number of the illustrations in the book were likely derived from victims of the Nazi regime from 1938 to 1945. It is, therefore, within the individual user's ethical responsibility to decide whether, and in which way, he wishes to use this book. For additional information, refer to the following articles "Ethics and access to teaching materials in the medical library: the case of the Pernkopf atlas." Michel C. Atlas, Bulletin of the Medical Library Association, 2001, 89(1):51-58; "Upon finding a Nazi anatomy atlas: the lessons of Nazi medicine." Richard S. Panush, Pharos of Alpha Omeg Alpha, 1996, 59(4):18-22; "What should we do about Eduard Pernkopf's atlas?" Garrett Riggs, Academic Medicine, 1998, 73(4):380-386; "How the Pernkopf controversy facilitated a historical and ethical analysis of the anatomical sciences in Austria and Germany: a recommendation for the continued use of the Pernkopf atlas." S. Hildebrandt, Clinical Anatomy, 2006, 19(2):91-100

A note that pre-dated this research can also be found in the MARC 520 Summary field in one copy of *The Atlas* at the authors' institution. The Cataloging and Metadata Services Department cautioned against removing or adding notes in the 520 field as this would change the OCLC master record, and impact other institutions' holdings. The initial review of the ARL institutions' library catalogs reveals use of the 520 field for *The Atlas* at some institutions and the 59X field at others. Further research and discussion among the library community would be useful to determine whether a 520 summary note should be widely adopted. This strategy would have the benefit of creating a precedent in which libraries were not required to provide contextual notes for controversial works, but by which they would be encouraged to do so to better equip their users to work in informationally literate and ethically informed ways. The authors have chosen *The Atlas* as a case study precisely because of the egregiousness of the ethical issues involved in its creation. However, it is possible that other, less controversial, works would also benefit from contextual notes. Any precedent or best practice proposed to libraries should be flexible enough to accommodate this spectrum, while also respecting the practices and mission of the individual institution. While providing this information in a larger context could be challenging in terms of the ultimate subjectivity of deciding which works require contextual information, a simple note in a master record would indicate that a particular work was part of an ongoing discussion and help to position it within a historical framework. Additional methods for providing context, such as educational materials offered inside or along with the book, are also recommended as avenues for reaching patrons who may not consult the catalog, and to ensure that they have the necessary skills to analyze texts whether or not they are marked as controversial. The ARL libraries included in this survey have chosen to house the book in a variety of locations, including special collections, storage, health sciences libraries, and general collections. The book's location and circulation status have important implications for access and potential usage. *The Atlas* may hold a different contextual meaning in a health sciences library than in general or special collections, in which it might support the study of medical history or ethics more readily than clinical practice. Situational meaning created by location is balanced by curatorial and cataloging decisions that provide additional context to the work. Alternate schemas may be consulted as the traditional cataloging

terms may not provide accurate descriptions in culturally sensitive contexts.[26]

The guidelines drafted by Archives for Black Lives in Philadelphia insist that the description provided of the resource, including any contextual notes, be useful to the likely users and respectful of the multitude of possible uses of a particular work. Additionally, the guidelines address the research value of the metadata itself by proposing that institutions update their records while also maintaining the superseded data.[27] The survey responses described in the current study demonstrate the need for institutional memory with regard to all works, if libraries wish to provide valuable context, and the opportunity for users to understand how the context of a particular work has evolved over time. Description should encourage access while also promoting information literacy. In the case of *The Atlas*, this might mean finding an equilibrium between describing the book as a clinical text and a historical resource. In either case, this must be done in a way that focuses not only on the work's content, but also on the nature and processes of its production. This duality is at the heart of the responsible description of controversial works in research libraries, and the imperative to teach researchers to approach all works with the necessary skepticism and critical distance to view them as products and as content. This is an area in which metadata librarians, instruction librarians, and curators can work together to ensure that researchers encounter texts like this within the appropriate context and in a way that equips them to make their own decisions about how, and whether, to use them.

Encouraging and promoting use of the resource for education regarding medical ethics is recommended. Librarians may consider incorporating *The Atlas* into their teaching of information literacy principles, specifically the critical evaluation of materials.[28] They may also have opportunities to make faculty aware of *The Atlas* as a teaching tool. The interdisciplinary area of medical humanities or the inclusion of humanities and arts within the medical education curriculum is deemed essential for the development of the moral and professional identity of a physician.[29] Such courses would benefit from the inclusion of *The Atlas* as a case study. As the ethical concerns surrounding *The Atlas* continue to make headlines, this could be a case for instruction of future medical professionals as Mages and Lohr have demonstrated.[30]

The emphasis on encouraging researchers to view information for its content and through the lens of its production is embodied in the Association of College and Research Libraries (ACRL) Framework for Information Literacy for Higher Education. One frame is particularly applicable to controversial texts in research libraries. "Information Creation as a Process," posits that:

> Information in any format is produced to convey a message and is shared via a selected delivery method. The iterative processes of researching, creating, revising, and disseminating information vary, and the resulting product reflects these differences.[31]

Individuals working with this frame are encouraged to contemplate the decisions, actions, and practices that condition the nature of information and how it is packaged, archived, and transmitted. These conditions have implications for the epistemology of the text as researchers encounter it; a thorough grounding in information literacy, guided by a librarian, can help researchers to navigate them effectively and ethically.

Conclusion

This study is informed by one research library's encounter with *The Atlas* as an ethically problematic text that is still widely used in several medical fields. By surveying libraries at Research 1 institutions that hold *The Atlas* in their collections, it is possible to understand how libraries responded to *The Atlas* as a resource, and the implications of these choices for library best practices for dealing with controversial works. Libraries have a mandate to provide access to information. However, that responsibility must be accompanied by an emphasis on context and information literacy to provide patrons with a comprehensive and ethically conscious research and learning experience. The history and continued presence of *The Atlas* in library collections provides a means by which to study how libraries can balance the desire to avoid censorship with the need to offer morally responsible, historically-contextualized access to all works, including those that are controversial. Certain egregious cases, like *The Atlas*, permit a thought experiment in which libraries can ask questions about how best to make patrons aware of the need to approach information critically. The authors propose that this can be done in a way which avoids censorship by focusing on how the information was produced, rather than simply the information itself, while helping researchers to ask questions of the work before them.

The Atlas is simultaneously unique and representative of a larger phenomenon in libraries in which no work can be read as ethically neutral. The manner in which libraries approach *The Atlas* and other works with ethically vexed origins help to condition the library's larger message regarding how readers approach information and how they can encounter, evaluate, and synthesize it in responsible and thoughtful ways.

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Appendix A

Email that accompanied the survey

Dear_____,

We are contacting you to request your participation in a research survey regarding your library's holdings of the book Atlas of topographical and applied human anatomy by Eduard Pernkopf. Our library owns several editions of this work and it has recently come to our attention that the University of Vienna determined that some of the illustrations may be based on executed victims of political terror. There are also Nazi symbols incorporated into signatures on individual illustrations. We are investigating whether other research libraries are aware of this and if so, whether any actions have been taken such as a change to the book's loan policy or provision of informational material to users as a result. You are receiving this survey because one or more copies of this text were listed in the library catalog of your institution during a search in July 2019. This survey is anonymous. We will not be collecting any identifying information about you or your institution, unless you voluntarily opt to provide your contact information for further follow-up. We plan to utilize the results of the survey to report on the current treatment of this text in ARL member libraries. Additionally, we hope to provide libraries with useful options for handling controversial texts in a thoughtful manner. The survey will close in two weeks on _____. Thank you in advance for your assistance with this research.

Author Names
Institution Name

Research Consent Form that accompanied the Survey

Project Title: A reconsideration of library treatment of ethically questionable medical texts: The case of the *Pernkopf Atlas of Anatomy* Principal Investigator: _____
Co-Investigators: _____
Department: University Libraries

You are being asked to be a volunteer in a research study.

Purpose

The purpose of this study is to Identify if it is necessary to redistribute previous materials regarding the ethical considerations of the *Pernkopf Atlas of Anatomy*. Identify common and/or best practices for informing patrons without censoring materials from a library collection. Share this information in policy development for application to *Pernkopf Atlas of Anatomy* as well as other ethically questionable medical texts.

Procedures

If you decide to be in this study, your part will involve: Completing a short survey about your library's holdings of the Pernkopf *Atlas of Anatomy*.

Risks/Discomforts

There are no foreseeable risks or discomforts associated with your participation in this study.

Benefits

There is no direct benefit expected as a result of you being in this study.

Payment to You

You will not be paid for your participation.

Confidentiality

All the information we get about you will be not be linked to you at all. The responses to this survey are anonymous. We will do this by not writing down your name or anything else that could link you in any way to the answers you give us for our study. All the study data that we get from you will be kept locked up. If any papers and talks are given about this research, your name will not be used.

Costs to You

There is no cost for participating in this survey.

Alternatives

Your alternative to participating in this study is to choose not to participate.

Your Rights as a Research Subject

Your participation in this study is voluntary. You do not have to be in this study if you don't want to be. You have the right to change your mind and leave the study at any time without giving any reason, and without penalty. Any new information that may make you change your mind about being in

this study will be given to you. You may print a copy of this consent form. You do not lose any of your legal rights by completing this survey.

Questions about the Study or Your Rights as a Research Subject

If you have any questions, concerns, or complaints about the study, you may contact _____
at telephone # _____

If you have any questions about your rights as a research subject or if you would like to obtain information or offer input, you may contact the _____University Research Subject Advocate, _____OR by e-mail, _____

Visit _____University's Community Outreach page, http://research._____ overview-of-volunteering-in-research for more information about participating in research, frequently asked questions, and an opportunity to provide feedback, comments, or ask questions related to your experience as a research subject.

If you complete the following survey, it means that you have read (or have had read to you) the information given in this consent form, and you would like to be a volunteer in this study.

Survey

Can you confirm that your library currently holds a copy of any edition of Eduard Pernkopf's Atlas of Topographical and Applied Human Anatomy?

Yes (1)
Unable to determine (2)
No (3)
Skip To: End of Block If Can you confirm that your library currently holds a copy of any edition of Eduard Pernkopf's Atlas... = No

Please describe the primary nature of your collection.

Health Sciences Collection (1)
Special Collection/Archive (2)
General (3)
Other (4) _____

Where are your holding(s) currently located? If multiple copies/editions exist, please select all that apply.

Circulation (1)
Reference (2)
Special Collections (3)
Storage (4)
Other (5)

Was this the item's original location?

Yes (1)
No (2)
Not sure (3)
Display This Question: If "Was this the item's original location?" = No

What was the item's original location?

_____
_____
_____
_____

Please briefly describe the rationale of the location selected for this item (i.e.- storage due tolack of space)

_____
_____
_____
_____

When was the most recent activity (viewing, circulation, request) associated with this item? If multiple copies/editions exist, please select the most recent.

within the last 6 months (1)
6 months - 1 year (2)
1-2 years (3)
2+ years (4)
unable to determine (5)

Please provide the acquisition method for this item. If multiple copies/editions exist, please select all that apply.

donation/gift (1)
purchase (2)
part of a large scale or package purchase (3)
unable to determine (4)

Please provide the year of acquisition for this title if available, if multiple copies/editions exist please separate each date entry with a comma: (i.e. 1992, 2002)

_____

Are you aware of this atlas being used for any specific teaching and/or research purposes at
this time?

Yes (1)
No (2)
Skip To: Q12 If "Are you aware of this atlas being used for any specific teaching and/or research purposes at this…" = No

To the best of your ability, please briefly describe the nature of the course and/or research project currently using the atlas?

_____
_____

Do you have any evidence of your library ever having received the information sheet from the University of Vienna titled 'Information for the Users of the Pernkopf Atlas'

yes (1)
no (2)

Does your library provide any contextual information to accompany the atlas? Please select all that apply:

note in the catalog record (1)
link to background information via discovery layer or catalog (2)
insert to accompany physical item in the collection (3)
librarian or library staff curation (4)
other (5) _____

Is there anything else you would like to tell us about your library's holding of the atlas?

Yes (1) _____
No (2)

Would you be willing to further discuss the holding information and details of Pernkopf Atlas of Topographical and Applied Human Anatomy?

yes (1)
no (2)
Skip To: End of Survey If "Would you be willing to further discuss the holding information and details of Pernkopf Atlas o…" = no

Please provide your email address and/or phone number for follow up: _____

Appendix B

UNIVERSITÄT WIEN

AUSSENINSTITUT

Mr. Gary D. Byrd
Health Sciences Library
State University of New York at Buffalo
3435 Main Street
USA-Buffalo, NY 14214

Vienna, November 1997

Subject: Enclosure of the „Information for the Users of the Pernkopf-atlases"

Dear Mr. Byrd,

In the name of the Rector of the University of Vienna, Prof. Dr. Alfred Ebenbauer, I may ask you kindly to add, if possible, the enclosed note of information to your copies of the „Pernkopf-atlases" (Eduard Pernkopf: "Topographische Anatomie des Menschen. Lehrbuch und Atlas der regionär-stratigraphischen Präparation." [*Topographic Human Anatomy...*] all volumes and editions.) and to forward it to relevant libraries linked to yours.

As you can see from the note of information, there are justified doubts regarding the ethic non-objection of individual pictures. Until the full discovery of the historical facts concerning their sources, we consider it necessary to inform the public, in particular the users of the atlases in the German-speaking as well as in the English-speaking area about these circumstances.

We hope that our request does not cause great inconvenience.

If you have any further questions on this matter, please contact me at the given address.

Thank you for your support.

Kind regards,

Bernd Matouschek

Enclosure

We have a new phonenumber (+43 1) 4277 - 181 01, -181 02
and a new faxnumber (+43 1) 4277 9181

Öffentlichkeitsarbeit · Mag. Bernd Matouschek
Dr. Karl Lueger-Ring 1 · A-1010 Wien · Telefon (+43-1) 40 103 3437

Notes on Operations
Moving a Unique Collection to Storage

Improving Access Now and Later

Jennifer A. Maddox Abbott

The University of Illinois at Urbana-Champaign Library collected college and university publications (the C-Collection) for several decades without allocating the resources to catalog them. A project to make these items discoverable by patrons was initiated, and tens of thousands of items were added to the online catalog. These items were physically stabilized and transferred to the library's high-density storage facility. A portion of the collection was also digitized, providing electronic access. Although circulation trended downward, there was no clear indication that materials were less accessible in high-density storage, and new items were discovered that had not previously circulated. Digital surrogates of library material clearly allowed the library to reach a much larger audience, and ideal storage conditions to preserve physical materials long-term combined with electronically available copies appear to be an ideal means for providing greater access while preserving content.

The University of Illinois at Urbana-Champaign (UIUC) Library collected college and university publications (the C-Collection)—bulletins, course catalogs, annual reports, schedules, and other ephemera —from domestic and international institutions for several decades but lacked the resources to catalog these materials. A project to make these items discoverable to patrons was initiated, and during a two-and-a-half-year period, tens of thousands of items were added to the library's catalog. A significant portion of these materials lacked OCLC records and required original cataloging, which suggests that many of the items are uniquely held at UIUC. In addition to making these physical items available for library patrons, they were physically stabilized and transferred to the library's high-density storage facility. A portion of the collection was also digitized, providing electronic access.

This distinct collection used a locally created classification scheme (beginning with "C"), making it possible to evaluate circulation data for these items through snapshots from the library catalog. The author sought to explore how this project affected access to the C-Collection, considering the impact of a good presence in the online catalog, in particular when that is the only access point for items held in storage, and how that access compares with the ability of patrons to physically browse library collections. Additionally, because a portion of the collection was digitized through the Internet Archive, there was an opportunity to compare physical circulation with digital access. This paper provides an overview of this large-scale collection management project, plus an evaluation of the accessibility of these materials before and after completion of the project.

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Manuscript submitted March 6, 2020; returned to author for revision June 1, 2020; revised manuscript submitted July 31, 2020; accepted for publication September 15, 2020.

Background

The C-Collection was originally housed in the library's main stacks, which lacked sufficient environmental control, with little attention given to materials' physical condition. Much of the collection was ephemera, and torn corners, rusty staples, and deteriorating paper were very common condition problems. These publications were classified using a locally created scheme, which grouped items by institution. They rarely had spines wide enough to provide identifying information, and although they were shelved in open stacks, browsing the collection was difficult due to the number of thin items packed tightly onto each shelf.

The C-Collection consists of two parts: items from US colleges and universities (domestic Cs) and items produced by colleges and universities outside the US (International Cs). The distinction between domestic and international Cs was determined by following the rules of the locally created classification system, which provided a clear delineation both through the call number scheme and their physical location in the stacks. Because of this clear delineation, the project team was able to easily retrieve and process materials in the order that they were shelved, systematically clearing the area of the stacks that held the domestic Cs a shelf at a time. Although it is possible that there were errors in classification and it is probable that items were misshelved, the materials were more organized than most projects involving cataloging backlogs.

The international portion of the collection was not included in the scope of the project. It is estimated to be approximately one-third the size of the domestic Cs. These remaining items require foreign language expertise in a variety of languages, and it was not feasible to include it in the project scope. Furthermore, this research focused on the portion of the C-Collection housed in the main stacks that was transferred to storage. A small number of additional items have been classified with a C call number but fell outside the scope of this project and the ensuing research. Items housed in other departmental library collections on campus and items in the stacks permanently shelved separately, such as UIUC yearbooks, do not fall under this definition of the C-Collection.

Literature Review

It can be problematic and more expensive to retrieve materials from storage to retrospectively improve cataloging, and by streamlining several goals into a single project, the library made a greater impact and demonstrated good stewardship of resources.[1] Careful planning allowed librarians to combine multiple objectives and to accomplish more with less. "Rethinking workflows as projects rather than business as usual can encourage higher productivity, minimize the number of times items need to be touched, and generally create an environment that rewards accomplishment."[2]

In addition to increasing discoverability of a previously uncatalogued collection, the project facilitated the digitization of the collection at a later date by creating the necessary metadata, housed materials in preservation quality envelopes as needed, and moved the materials to a climate controlled storage location suitable for long-term preservation. Space in the main stacks was freed up for other collections housed in that location to expand, making that material more accessible.

UIUC conducted a 2002 space study and found that the main stacks were at 99.65 percent capacity, with some ranges as much as 107.6 percent full.[3] Atkins and Weible found that transferring materials to storage reduced errors in retrieval and in shelving. Once shelves were less crowded and materials were no longer piled on the floor or on top of other items, retrievers could more successfully find items and shelvers could shelve materials in the correct spot.[4]

The most cited concerns when a library transfers materials to a storage location include the time required for patrons to receive materials and the belief that materials in storage are less accessible to researchers.[5] Although chance discoveries can certainly occur when shelf browsing, as Barclay explains in "The Myth of Browsing," this method is less successful than patrons believe.[6] There are several hindrances to success: the most in-demand items are most likely to be checked out and therefore not discoverable. An item can only be shelved in one physical location, regardless of the number of topics it encompasses or its interdisciplinary nature. Location of items on the shelf can impact success. "Just as products positioned on the middle shelves of grocery stores sell better than those on higher or lower shelves, books that come to rest on the middle shelves of library stacks circulate more than books above or below."[7] Additional barriers to browsing include shelves overcrowded with books that lack spine labels or dust jackets. This collection in particular did not lend itself to browsing because there were thousands of thin paper pamphlets, some in pamphlet binders, packed tightly on the shelves, and most lacked a spine thick enough for any sort of label or indication of content.

Being unable to physically browse library collections means that quality access through the online catalog is even more important for materials transferred to storage. "Material stored without a reliable record is, for most practical purposes, lost."[8] Shlomo pointed out, "the disadvantages of storage can be somewhat ameliorated by full bibliographic description of the titles stored."[9] For this project, extensive work to ensure catalog access was essential. The library "made a commitment to fully catalog all materials going to the [high-density] facility so that library users can search for materials by all available access points."[10]

Table 1. C-Collection Items in Catalog Before Project Began

	Number of items	Percentage of items
Cataloged	9,293	14.6%
Uncataloged	54,359	85.4%
Total collection	63,652	100%

Not everyone is concerned about the loss of physical browsing or the time required to get requested library materials. One study found that most students liked having books retrieved for them and felt they got the books faster than if they had to locate them.[11] At UIUC, "items are made accessible to patrons within 24 hours (excluding weekends and holidays) of their request."[12] A survey of university libraries in Australia and New Zealand found that respondents did not indicate user resistance to remote storage, and noted users' changing attitudes, that "they have come to accept either that access can be provided by means of a digital surrogate or that delayed access to stored content may be necessary if the original item is required."[13]

When making decisions related to the physical shelving and storage of library materials, it is essential to remember that "'low use' does not mean irrelevant. In fact, low-use materials are often the unique research materials that most distinguish a library's collection," making long-term preservation and online access to these unique materials even more important.[14] "Off-site storage is a relocation of existing owned materials, not a destruction or replacement of them."[15] Preservation and access may both improve when an item is transferred to storage. When a book is sent to high-density storage, it "does not become forever unavailable or undiscoverable. Thanks to existing and emerging online search tools, books that go off site in the digital age are actually more discoverable than they were sitting on the shelf in the predigital world."[16] Respondents to a survey conducted by Priddle and McCann described how low-use collections transferred to storage began to circulate once they were well-described and discoverable in the online catalog. "The irony is that, once materials are described and accessible, even predicted low-use collections can become desirable for researchers."[17] Burton and Kattau found in their study that transferring materials into non-browsable storage had "not been an impediment to discovery and access," seeing more than five thousand items circulate for the first time.[18]

The Project

A report was generated that showed all cataloged items with a C call number that fell within the project's parameters. Although the C-Collection was physically browsable, most of the collection was only discoverable in the catalog through a single collection-level record. A total of 9,293 items were cataloged, while the collection was estimated to include 45,000 items.

Table 2. Cataloging Required for C-Collection

	Items	Percentage of Collection
Original cataloging	27,393	43.0%
Copy cataloging	26,966	42.4%
In catalog, location changed	9,293	14.6%
Total	63,652	100%

The library's Collection Management Services (CMS) unit executed the C-Collection project. It began in July 2012 and was completed in April 2015. It took thirty months to complete, with a six-month break in fall 2014 to focus on more time-sensitive projects. A team of four full-time equivalent (FTE) academic hourly project staff retrieved the materials from the main stacks. They stabilized and/or housed almost every item, which consisted of placing them in preservation-quality envelopes in most cases. They added bibliographic records for items lacking an online presence, and when necessary, created bibliographic records for items that were more straightforward or traditional. Two staff members in the unit devoted half of their time to the project, answering cataloging questions and handling the more complicated original cataloging. The items were then transferred to UIUC's high-density storage facility, which is located on campus, one mile from the main library.

Ultimately, due to the large number of slim pamphlets, the collection was found to contain 63,652 items, which is 41.4 percent greater than originally estimated. At the beginning of the project, more than eighty-five percent of the collection (54,359 items) was essentially inaccessible through the catalog (see table 1). Of the 54,359 items added to the catalog, 26,966 had copy available in OCLC, and 27,393 items required original cataloging (see table 2).

Method

Before the project began in 2012, the team ran a report for all items with the local call number prefix C that fit within the project's scope to identify how many items in the collection were actually represented in the catalog. The team ran the same report again in 2018 after the project was complete. The library began using Voyager as its Integrated Library System (ILS) in 2002 and migrated to Alma in 2020, so consistent circulation data can be evaluated and compared beginning in 2002.

Table 3. C-Collection Items That Circulated at Least One Time

Date Range	Items Circulated	Percent Circulated	Items Never Circulated	Percent Never Circulated
2002–2012	1,044	1.6	62,608	98.4%
2013–2018	329	0.5	63,323	99.5%

The project ran from July 2012 to April 2015, with items being continually processed and transferred to storage throughout that period. A small selection of items was digitized at this time, including UIUC publications and pre-1923 items, which could be made available in full view. Although the ideal project would have digitized all items in the collection as they were processed for storage, the resources were not available at the time and most of the items were digitized at a later date through a different project, with most of the digitization completed by 2016. Due to the large-scale nature of this project, tracking exact dates of transfer of individual items was not feasible, but estimates made using the data available were accurate enough to explore circulation trends. For this research, circulation comparisons used the reports run in 2012 and again in 2018, comparing pre-project circulation (2002 through 2012) and post-project circulation (2013 through 2018).

Any items lacking a record in the online catalog had not circulated since 2002 when the current ILS was implemented. The library began barcoding materials in the mid-1990s, and the decision was made to only barcode materials in the main stacks at the point of circulation to hold down costs.[19] If a patron wanted to check out an item that was discovered in the main stacks through shelf browsing and it was not in the online catalog, the item was barcoded and a brief record was created in the catalog at that point. For this reason, all uncatalogued items were included in the counts of items that never circulated.

Results

Comparing Circulation

The number of items that circulated one or more times from this collection was very low. Before the project began, 1,044 items (1.6 percent) circulated, and 62,608 items (98.4 percent) were never checked out. After the project was completed, 329 items (0.5 percent) circulated, and 63,323 items (99.5 percent) never circulated (see table 3). Of those 329 items that circulated in 2013 to 2018, 225 (68 percent) had not previously circulated. The remaining 54,134 newly cataloged items had not circulated as of 2018.

Considering only the number of items that circulated and not the total number of circulations that occurred, provides a partial picture of usage. Additionally, the date ranges for pre- and post-project are not equal and comparing the number of items that circulated may not be the most useful view of the data. The total date range is seventeen years, with eleven years of pre-project data and six years of post-project data. The author more closely examined the average circulations within the ranges. From 2002 to 2018, this collection saw a total of 2,183 circulations. From 2002 to 2012, there were 1,735 circulations of the 1,044 items. From 2013 to 2018, there were 448 circulations of the 329 items. The collection had an average of 158 circulations annually before the project, and an average of seventy-five circulations annually after the project (see table 4), leading to a 52.5 percent decrease in circulation.

Table 4. C-Collection Average Circulations per Year

Date Range	Circulations	Average Per Year
2002–2012	1,735	158
2013–2018	448	75

Circulation of the Digitized Collection

The library's Digital Content Creation unit digitized 7,836 C-Collection items through the Internet Archive, and 6,553 of those fell within the scope of this project. Of those, fifty-three items (0.8 percent) circulated between 2002 and 2012, and nine items (0.1 percent) circulated between 2013 and 2018 (see table 5). The percentage of the digitized collection that circulated (albeit an extremely small sample size) was slightly lower than for the C-Collection overall.

The digitized collection had 101 total circulations for the entire date range of 2002 to 2018, with eighty-nine circulations taking place prior to digitization and twelve circulations taking place subsequently. On average, the portion of the collection that was digitized had eight circulations per year before digitization and saw two circulations per year after digitization (see table 6).

Electronic Access versus Physical Circulation

Data has also been collected on electronic access to the digitized portion of the collection through the Internet Archive. The Internet Archive calculates a view as "one action (read a book, download a file, watch a movie, etc.),

Table 5. Digitized Items That Circulated at Least One Time

Date Range	Items Circulated	Percent Circulated	Items Cever Circulated	Percent Never Circulated
2002–2012	53	0.8	6,500	99.2%
2013–2018	9	0.1	6,544	99.9%

Table 6. Digitized Items Average Circulations per Year

Date range	Circulations	Average Per Year
2002–2012	89	8
2013–2018	12	2

Table 7. Views of Digitized Items

	Items	Views	Average Views Per Item
Total Digitized Collection	6,553	1,737,128	265
Circulated Items	59	23,927	406
Non-Circulated Items	6,494	1,713,201	264

per day, per IP Address. For each item page, using multiple files or accessing from multiple accounts in a single day counts as one view."[20] The item with the fewest views received four, and the item with the most views received 9,111. The digitized collection of 6,553 items had a total of 1,736,128 views, with an average of 265 views per item. The fifty-nine items that circulated were viewed 23,927 times, with an average of 406 views per item, and the 6,494 items that did not circulate were viewed a total of 1,713,201 since being digitized, which is an average of 264 times per item (see table 7).

Figure 1 shows the distribution of views for the digitized C-Collection, comparing items that had circulated with items that never circulated. Of note, more than ten percent of the circulated items also had more than 1,000 views, versus less than three percent of the collection that never circulated being viewed more than 1,000 times. The data is also provided in table 8.

An examination of the fifty-nine items that physically circulated revealed that the nine items that circulated after digitization were viewed for a combined total of 2,007 times, with an average of 223 views per item. The fifty items that did not circulate after digitization were viewed a total of 21,920 times, for an average of 438 views per item (see table 9).

Discussion

When considering the number of items that circulated, plus the total number of circulations, before and after transferring the C-Collection into storage, it is difficult to draw the conclusion that the added discoverability in the library catalog significantly increased access to the physical collection. Circulation numbers were very low both before and after the project. Deutch reported at the time that print circulation was trending down nationwide.[21] A study by Reeves and Schmidt saw an increase in the usage of electronic journals and a "dramatic decrease" in usage of print journals, and Cook and Maciel found that patrons prefer electronic resources for convenience and ease of use.[22]

It is encouraging to see that sixty-eight percent of the items that circulated post-project were from a group of resources that had not previously circulated. If this were a project with a singular goal and no other benefits beyond immediate circulation, it would be hard to justify the resources to catalog 54,359 items for patrons to discover 225 of them. In a situation with less constrained resources, an argument could be made that the discovery of those particular items may have a research-impact potential that extends beyond being quantified by a simple statistic. It is clear that "assessing the return on investment, or cost/value ratio, for cataloging is a difficult proposition at best."[23] Hider pointed out that determining the cost of the work is fairly straightforward, but "determining the corresponding benefits, in monetary terms, is much less straightforward and has rarely been attempted."[24]

Resources were allocated and justified because this project had the additional benefits of clearing space in the main stacks, storing the collection in better preservation conditions, physically stabilizing items for long-term preservation, and creating metadata to aid discoverability and to facilitate later digitization. Although the average circulations per year decreased post-project, this outcome does not suggest that the project was unsuccessful. For collections in the library's storage facility (i.e., prime preservation conditions), the priority is materials with a lasting research value that do not circulate heavily. For this reason, it is not a concern that these materials have not been used during the relatively short time frame.

When comparing the circulation of library materials shelved in open stacks versus storage, a key variable is electronic access. Once an item has a digital surrogate available

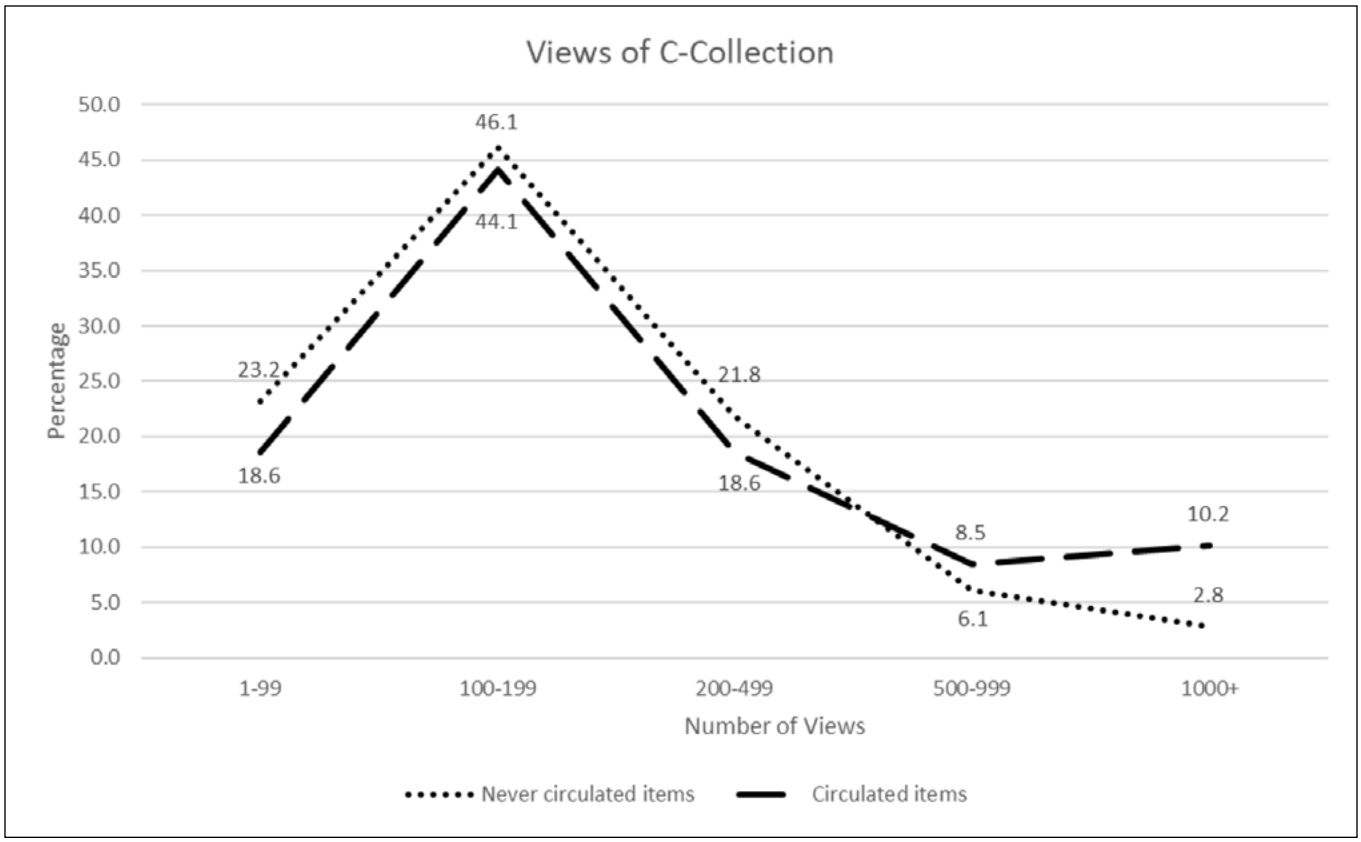

Figure 1. Comparing online views of items that circulated versus items that never circulated.

Table 8. C-Collection Views

Number of Views	Percent of Never Circulated Items	Percent of Circulated Items	Percent of Total Digitized Collection
1–99	23.2%	18.6%	23.2%
100–199	46.1%	44.1%	46.1%
200–499	21.8%	18.6%	21.7%
500–999	6.1%	8.5%	6.1%
1,000+	2.8%	10.2%	2.9%

Table 9. C-Collection Circulation and View Comparisons (Pre- and Post-Digitization)

	Items	Views	Average Views Per Item
All digitized items that circulated	59	23,927	406
Circulated post-digitization	9	2,007	223
Did not circulate post-digitization	50	21,920	438

to patrons, it is to be expected that the physical copies will not circulate as heavily. In this way, more patrons have access while also preserving and reducing damage to the library's physical copy. Although the sample size was small, the circulation of the digitized portion of the collection did decrease after digitization. Circulation for the entire

Table 10. International C Items Circulating from Stacks and Oak Street

	Total Collection		Transferred (Oak Street)		Not Transferred (in Stacks)	
	Items	Percent	Items	Percent	Items	Percent
2002–2012	1,741	14.6%	255	22.8%	1,486	13.7%
2013–2018	303	2.5%	81	7.2%	222	2.0%

Table 11. Average Circulations per Year for International C Items in Stacks and Oak Street

	Total Collection		Transferred		Not Transferred	
	Circulations	Per year	Circulations	Per year	Circulations	Per year
2002–2012	6,024	548	32	3	4,577	416
2013–2018	465	78	136	23	329	55

Table 12. Comparing Changes in International C-Collection Circulations

	Average Circulations Per Year (2002–2012)	Average Circulations Per Year (2013–2018)	Change in Circulation
Total collection	548	78	-470 (-85.8%)
Transferred items	3	23	+20 (+666.7%)
Not transferred items	416	55	-361 (-86.8%)

C-Collection decreased by 52.5 percent (average of 158 circulations per year pre-project down to seventy-five circulations post-project), but the digitized portion decreased by 75.0 percent (average of eight circulations annually to two circulations annually). Although the sample size is not statistically significant, the trend is in line with expectations—physical circulations decrease when an item is also available electronically.

In addition to physical circulations, there is a correlation between circulation and electronic access. It is notable that the items that physically circulated were, on average, viewed more electronically than the items that did not physically circulate. This finding seems to indicate that the items of most interest were of interest in either or both available formats. But the most impressive findings were the number of electronic views for this collection via the Internet Archive. The 6,553 items had more than 1.7 million views, and so expanded the reach and research value of this collection.

Conclusion

This research closely examined the circulation and digital access trends of a discreet collection to better understand the difference in access between library materials in open, browsable stacks that lack bibliographic records in the online catalog versus materials that are discoverable in the catalog but cannot be browsed in open stacks. Circulation trends were down, but there was no clear indication that materials were less accessible while stored in high-density storage. In fact, new physical items were discovered that had not been previously checked out by patrons, presumably due to the newly created bibliographic records. The metadata also facilitated access to digital surrogates which allowed the library to reach an exponentially larger audience than is possible with physical copies. The combination of ideal storage conditions to preserve physical content long-term and electronically available copies for patron access appear to be an ideal means to provide greater access while also preserving content for long-term use. "In the longer term, institutions will need to adjust cataloging workflows and investments in retrospective projects after carefully weighing the costs and benefits of discoverability and access against investment in operations."[25]

Future research would benefit from a larger sample size of material and/or a larger timeframe to compare circulation trends of collections in open stacks and high-density storage, plus examining discrete subject areas in more depth to ascertain trends by discipline or subject area. Lastly, it would be useful to explore a larger sample of digitized material and to evaluate access (i.e., "views") through alternate avenues such as HathiTrust or Google Books.

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Book Reviews

Elyssa M. Gould

Linked Data for the Perplexed Librarian. By Scott Carlson, Cory Lampert, Darnelle Melvin, and Anne Washington. Chicago: ALA Editions, 2020. 164p. $59.99 softcover (ISBN 978-0-8389-4746-3)

In the introduction, the authors of this concise work state that their aim is to present the basics of linked data specifically to librarians "whose background may not be traditionally considered 'technical'" (x). They state that the book "is a great primer on linked data basics, it is not an exhaustive dive into the topic, nor is it intended to make you an expert" (xi). To a large degree, the authors meet these objectives, at least to this reviewer who is not of a technical background.

The authors realize that members of the linked data community often have difficulty communicating with less technical library staff. They also acknowledge that while linked data is widely discussed at conferences and in the library literature, it is applied in real life only at larger institutions with larger budgets, staff, and institutional support. Meanwhile, other librarians wonder what relevance linked data has to their work.

First, the authors define linked data, which is data that can be read by both humans and machines. The authors begin with a history of linked data, which is also really a history of the internet, and more specifically the World Wide Web. They next discuss the "Semantic Web," which utilizes linked data. In one of many useful examples in the book, they explain the "Semantic Web" by depicting things your brain is likely to know about Charlie Chaplin, such as that he was a person with a movie career, even if you are not an expert in the history of show business. The authors then illustrate how linked data, in the form of the "Semantic Web," can make connections such as between Charlie Chaplin and the studio that produced his movies. That studio also produced movies by his friends Douglas Fairbanks and Mary Pickford, and later produced James Bond movies. This reviewer found examples such as this, and the accompanying graphics, to be quite helpful in illustrating how the data connections are made.

The book proceeds on to a history of Machine-Readable Cataloging (MARC). Not surprisingly, a format designed for a printed environment does not work for linked data, as it cannot create connections among various forms of data. It is also unknown outside of the library world. In the "About the authors" section, all four authors name their favorite P-Funk album(s). This reviewer (who read that part first) initially thought this was an interesting quirk, but it turned out to be a very important factor in their presentation of linked data. They used the example of a library receiving a donation of an extensive collection of funk and soul vinyl records. In another useful example, the authors describe the difficulties in using MARC to convey that an album may have both an LP and a CD version. It also cannot convey that an album is a collection of songs, because the MARC 505 (contents note) and 740 (Added Entry-Uncontrolled Related/Analytical Title) fields have weaknesses. The authors describe Resource Description Framework (RDF) as a linked data means of showing connections among various data points. For example, George Clinton is both a performer and a producer of musical albums.

As the book proceeds, it becomes more technical, as the authors warned in the introduction. They proceed to describe Universal Resource Identifiers (URIs) as a way to identify data in a format readable to both computers and humans. Next, they describe various linked data formats, including SPARQL, RDF/XML, N-Triples, Turtle, and JSON-LD. The descriptions include sample data presented in the various formats. The next chapter is devoted to ontologies and linked data.

Real world examples are also presented, explaining how a Google search might determine whether someone is searching for "Black Panther" the movie or "black panther" the animal. The authors also describe social media and Wikidata. The next few chapters attempt to answer the questions many librarians have: When and how are they going to use linked data? It already is used in libraries: Library of Congress name authority headings. They then proceed to the inevitable discussion of the Bibliographic Framework Initiative (BIBFRAME), the data model that is intended to eventually replace MARC. However, BIBFRAME, like linked data, is often discussed but seldom used in the general library world.

The authors wrap up their slim volume with some sample library projects that use linked data, such as doing inventories of data, exploring tools and technologies, remediating and enhancing metadata, using graphs and RDF, using linked data in communities, experimenting with real world data, assessing linked data, and finally, and perhaps most importantly, making the case for using linked data. While it was good to see these projects and it would be interesting to explore them further, it still seems unlikely

that many linked data projects will be initiated in any but the largest institutions, especially as all kinds of libraries must reinvent their everyday services and activities in light of the 2020 coronavirus pandemic. In the concluding chapter, the authors acknowledge that libraries are not currently using linked data, which means that an obsolete format continues to be used in part due to technical and staffing issues. The authors succeed in increasing the reader's understanding of linked data and the benefits of implementing it.

This volume was an engaging introduction to the topic of linked data. The good use of examples conveyed understanding of a technical topic to this non-technical reviewer. —*Judy Gitlin, (judith.gitln@dc.edu), Dominican College*

The Role of the Electronic Resources Librarian. Ed. George Stachokas. Cambridge, MA: Chandos Publishing, 2019. 176 p. $67.99 softcover (ISBN: 978-0-08-102925-1)

The eight chapters covered in this text give a detailed history about how the role of electronic resource (e-resource) librarians (ERLs) has evolved over the past several decades as libraries have shifted to an online environment. It covers the challenges faced from 1992 when the ERL title was first used, to 2019 where academic libraries are still a hybrid of print and electronic materials. The book is organized into eight chapters with three appendixes. The introduction gives a brief overview on the development of ERLs and a clear synopsis of chapters, which are a nice progression of how the ERL position has developed since the 1990s; how it has been represented in organizational structures across academic libraries; how it has handled a variety of obstacles (technology, expanding skill sets, budget constraints, etc.); and how it maps to current trends in managing e-resources.

The history of the ERL is covered in more detail than the current state and future of the ERL, and the details of the evolution of the ERL is a strength of this text. There is significant discussion on how technology, including the development of the World Wide Web, had a huge impact on the development of the ERL from CD-ROMs to online journals, e-books, and library websites. In several chapters the book addresses the many changes in technology, tools, standards, and requirements used to manage the information that has forced libraries to change. Chapter 5 discusses the Electronic Resource Management Initiative (ERMI), which saw the need for a system to manage all of the important information that needs to be tracked for e-resource management (ERM) systems. ERM systems were developed based on the Digital Library Federation (DLF) ERMI requirements. Other emerging technologies had a big impact on ERLs, including web scale discovery, knowledge bases, and COUNTER statistics. Historically, libraries have struggled to rethink their work with new technology and have been resistant to change. Many libraries are still facing the same issues and limitations, but it is critical to adapt to remain relevant.

Of particular interest is the impact of the evolving role of ERLs on organizational structures. New technology, along with the shift to an online environment, led to changes in how users looked for information, the development of new skill sets, and this forced libraries to rethink their structures. The book highlights several studies related to the evolution of ERL positions and how the role of the position has changed over time. Impacts such as economic downturns and the growth of e-resources have forced libraries to rethink positions, workflows, and services. These changes have resulted in different approaches to assigning ERL responsibilities. Early on, most of the work was assigned to one position, but as discussed in Chapter 8, most ERM work currently is a group effort, and many libraries still struggle with adequate staffing for managing e-resources.

A recent driver in reorganizations has been the Core Competencies developed by the NASIG Core Competencies Task Force (NCCTF) and its members in 2013. Appendix A, "Core Competencies for Electronic Resources Librarians," includes a detailed explanation of the seven competencies. It clearly expresses the overall complexity of the challenge libraries are facing to transition to mostly electronic collections and the skill sets needed to manage them. With the lack of ERM courses in LIS programs, Chapter 8 discusses how ERLs have become more dependent on professional organizations for education in addition to on-the-job training.

The Role of the Electronic Resources Librarian provides valuable insight into the many challenges ERLs have faced and continue to face, and the importance of addressing and adapting to the ongoing changes in the digital world. Library administrators and technical services departments will relate to this book as many continue to struggle with managing traditional library services alongside the growth of electronic resources. Many questions still remain on how best to manage e-resources, but it is clear that it is vital to the survival and value of libraries. As the author says, "Librarians need to commit to providing the best possible information services in the digital world" (101). This book leaves one with a lot to think about and ponder in terms of the role of the ERL going forward.—*Jennifer Murray, (jennifer.murray@unf.edu), University of North Florida*

Techniques for Electronic Resource Management: TERMS and the Transition to Open. By Jill Emery, Graham Stone, and Peter McCracken. Chicago, IL: ALA Editions, 2019. 232 p. $56.99 softcover (ISBN 978-0-8389-1904-0)

Electronic resources (e-resources) have become an integral part of libraries' resources in many parts of the world and enable libraries to meet users' needs whenever and wherever they are located. Open access (OA) resources similarly decrease financial and geographic barriers to using content. Libraries incorporate open resources into their collections to enhance or replace their subscribed content. As pressure mounts for authors and publishers to make content open, many libraries also support the creation and provision of OA materials. During unexpected disruptions, such as the 2020 coronavirus pandemic, these subscription-based and OA resources enable libraries to continue to meet their users' needs as they cancel events, close physical locations, and support efforts to move courses and workplaces entirely online. *Techniques for Electronic Resource Management: TERMS and the Transition to Open* provides a thorough and sophisticated overview of the work that goes into supporting these types of resources.

The updated Terms for Electronic Resource Management (TERMS 2.0) project breaks e-resources management into six steps and their component parts. The steps have evolved since version 1.0. While people new to e-resources management can skip over the first chapter and delve into the actual content, others may find the comparison of the two versions interesting. OA has become a major theme in version 2.0. In addition to sections about how each step applies to straightforward e-resources and several ways some resources get more complex, each chapter includes a section that explains how that step applies to OA resources. The book itself is available as an OA document.[1]

E-resources continue to evolve, but much of the work in acquiring and supporting them remains steady. The crisp, tight summaries in this book overlap with the contents of other publications about e-resource management and about libraries' roles as consumers and providers of OA content. Each chapter includes at least thirty citations to previous literature, providing ample connections to the wider literature on the topic. The authors synthesize that information to provide clear introductions to each topic.

The authors focus on efficiency. Throughout the book, they recommend creating workflows and templates and relying on standards to simplify processes and save time (16, 24, 45, 51). Other time-saving tips include recommendations to publicize license negotiation deal breakers on the institution's website (38) and to document wherever possible (25, 27, 56–57, 143). Some chapters simply identify the current landscape while others, such as Chapter 2, include practical tips. The authors also note in that e-resources staff do not work in isolation. Other experts, such as people who work in the university's procurement office, information technology groups, and disability support services offices can provide valuable advice and feedback (43–45 and 54–56). Working with those groups can ease the burden on the e-resource management staff and free up time for other tasks.

Additionally, the authors consider aspects of e-resources management work that may be omitted from other guides. The authors treat communicating what the library has in its collection as an integral part of managing e-resources and weave references to it into several steps. They do not see it as an extra responsibility, but as part of the every day work of managing e-resources and OA content (84). The authors also give brief, but serious attention to accessibility rather than treating it as something that is nice but secondary (22–23, 44, and 109). These small considerations make the book stand out.

While much of the content in this book is relevant to library employees at all types of libraries, the book is geared toward people working at academic libraries in research-intensive institutions in the United States or the United Kingdom. The authors, whose institutions reflect those settings, acknowledge their focus on those geographic areas but make brief mentions of other areas in comments that the Global South has been a leader in adopting OA (7) and a note that negotiations in some areas take place at the country- or region-level rather than at a specific institution (39). The narrow focus on library types makes sense given the authors' backgrounds, but is not explicitly stated.

A few minor weaknesses do not detract from the book's overall value. At least one figure is too small and difficult to read in grayscale but is not critical to the book. In Chapter 2, the authors also make an unsupported claim that interlibrary loan usage tends to be approximately one tenth of the usage of a subscription (17) even though existing studies show a range of relationships.[2]

While the authors explicitly identify library school students as part of their intended audience (9), the book's primary value is for people who have experience with one aspect of librarianship and are taking on responsibility (or additional aspects of) e-resource management or OA support. The book presumes some background knowledge, including jargon, that may be unfamiliar to some. The division between the typical e-resource and complex exceptions will help new e-resources staff ease into their roles. The explicit connections between managing e-resources and supporting OA content also frame OA provision in an understandable way, though the variety of OA models that libraries and publishers are working out may still be difficult for inexperienced library staff members to fully

grasp. The most valuable parts of the book are the chapters on licensing and troubleshooting. Many people approach both topics with some trepidation and developing a level of comfort in doing those tasks takes time and practice.—*Erin Wentz (erin.wentz@mcphs.edu), MCPHS University*

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