EDITORIAL
Thriving in a Changing World
Michael Fernandez and Rachel E. Scott

Library and information professionals working with resources encounter change on a daily basis—both internally initiated and externally imposed. We therefore have ample opportunity to consider how we plan for, implement, and assess these changes.

As we enter into a new year, it's common to contemplate change. Of course, this can mean many things. Change can be good or bad, intentional or reactive. There are the changes we'd like to see and the changes we have to contend with. Here at *LRTS*, we've been thinking about change a lot lately, in particular how it impacts our daily work in technical services.

At the risk of a major understatement, 2025 saw a good deal of change in our profession. More often than not, the instigating factors of change on technical services work have been from external actors. The actions of the current administration in the United States have had deleterious impacts on the state of education and research that are central to the work of libraries. Funding for universities has taken hits from multiple angles, including cuts to federal research grants, threats to endowments, and targeting of international student enrollments. Initiatives supporting diversity, equity, and inclusion (DEI) have come under increased scrutiny at both the federal and the state level. Institutions with DEI works in progress have been forced to pivot efforts, recontextualizing work that had previously fallen under the aegis of DEI or, in some cases, scrapping these efforts altogether.

Libraries have also felt the effects of industry-imposed changes. Changing models of acquisition and access have forced us to reconsider what we collect and how we manage it. Clarivate's February 2025 announcement of a move to subscription-only models for ebooks signaled a major industry player's shift from ownership to access models.[1] Libraries adjusted their collection strategies in the wake of the announcement and will continue to assess impacts when the subscription-only model takes effect later in 2026. Overall, how we have responded to these changes and the choices we make going forward will impact our work for years to come.

By the time this issue sees publication in January 2026, we the editors and editorial board of *LRTS* will have already shared a call for papers in anticipation of an upcoming special themed issue. The topic, appropriately enough, will be change management in technical services. Although a variety of models and frameworks for change management exist, they typically involve making the case for a change, planning the change, implementing the change, followed by ongoing evaluation and improvement after the change.

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We want to hear from you, the library workers on the frontlines dealing with the myriad types of changes impacting your daily work. Change, of course, is broad in meaning, and not just limited to events occurring in 2025. Changes can also mean organizational restructuring, system migrations, and changes pertaining to the adoption of developing technologies such as artificial intelligence (AI). Change is frequently iterative and can require some degree of trial and error. Accordingly, we are as interested in hearing about what didn't work as we are hearing about what was successful. The story of change is rarely a linear one and we are looking forward to you sharing your change stories with us.

The call for submissions is intentionally broad in scope. A variety of topics fall within the scope of the special issue, including but not limited to:

- Change management frameworks viable in technical services
- Changes in workflow arising from the use of AI tools within technical services
- Cultural changes related to technical services for staffing, reporting, organization, and employment
- Economics of change and budgetary implications
- Implementation of new standards or projects
- Legislative and policy changes related to access, equity, and opportunity
- Response to vendor changes (e.g., acquisitions models, vendor mergers, product closures)
- System migrations, implementations, or platform changes

The issue is tentatively scheduled for January 2027. Submissions will be considered on a rolling basis; however, to ensure that your manuscript is considered for the special issue, it must be received no later than May 1, 2026. Features (research articles) and Notes on Operations (case studies) will go through peer review as outlined in the Editorial Policies. Communications on Practice (shorter or more informal pieces) will be reviewed by the editors. Please consult the Author Guidelines when preparing your manuscript.

Please reach out with ideas, questions, or expressions of interest to special issue guest editor Melissa Zilic (mzilic.librarian@gmail.com).

Meanwhile, the current issue of *LRTS* offers a bit of foreshadowing on the topic of managing change. Indeed, an argument for the relevance of physical media formats to library collections, the introduction of an online Arabic thesaurus, an exploration of pathways for library acquisition of Indigenous audiovisual media, research into critical and inclusive cataloging and metadata projects in academic libraries, and a case study on the implementation of ClickUp to streamline invoice management in a small academic library can all be read as critical engagement with changes in the landscape.

Communications on Practice

Colin Higgins makes a compelling argument for "The Continuing Relevance of DVDs and Blu-ray Discs to Library Collections." Physical media provides permanent ownership, superior audiovisual quality, bonus content, and offline accessibility, and maintaining physical collections supports preservation, intellectual freedom, and equitable access—core values of libraries.

In "Creating an Online Arabic/English Thesaurus Based on Linked Data," Magda El Sherbini introduces readers to the multilingual thesaurus. The insufficient description provided by English-language subject access to materials in other languages, and especially languages using non-Roman scripts, inspired El Sherbini to create this tool. In this Communications on Practice piece, she discusses its philosophy, construction, and application.

Features

Kathia Ibacache and Arthur Aguilera report on interviews with individuals who work in production and distribution companies in "Voices from the Field: Library Acquisition Pathways for Indigenous Audiovisual Media." The complexity of distribution networks makes them difficult to navigate and highlights the need for librarians to develop partnerships with Indigenous creators and educational distributors to increase the representation of Indigenous audiovisual media in library collections and educational distributor product offerings.

In an "Environmental Scan of Critical and Inclusive Cataloging/Metadata Projects in U.S. Academic Libraries," Tiffany Henry reports on a survey conducted with cataloging and metadata professionals. Henry investigates the nature of the projects, whether the projects are completed, and the supports and barriers encountered. This work will help readers understand and contextualize the work undertaken to advance equity, diversity, and inclusion by cataloging and metadata professionals in academic library settings.

Notes on Operations

In "Streamlining Invoice Management in Academic Libraries: A Case Study Using ClickUp," Russell Michalak and Devon Ellixson document their transition from fragmented, manual invoice management processes to the implementation of a centralized project management platform. This implementation has reduced invoice processing time and promoted accuracy and sustainability in their workflows.

Book Reviews

Books reviewed include *Assessing Academic Library Collections for Diversity, Equity, and Inclusion* by Karen Kohn, *The Digital Accessibility Handbook for Libraries* by Carli Spina and Rebecca Albrecht Oling, and *The High-Impact Digital Library* by Anna Neatrour, Jeremy Myntti, Rachel Jane Wittmann, Rebekah Cummings, Jane Monson, and Megan Myres McMillan.

Note

1. Matt Enis, "Clarivate/ProQuest Announces Subscription-Only Ebook Licensing Model," *Library Journal* (February 20, 2025), https://www.libraryjournal.com/story/clarivate-proquest-announces-subscription-only-ebook-licensing-model.

The Continuing Relevance of DVDs and Blu-ray Discs to Library Collections

Colin Higgins

This paper examines the ongoing relevance of DVD and Blu-ray Disc collections to libraries at a time of dominance by streaming video. Using the 2020 HBO Max removal of *Gone with the Wind* as a catalyst for discussion, the study explores the shift from physical to digital media consumption and argues that optical disc collections remain essential to library services. While streaming services such as Netflix, Amazon Prime Video, and Disney+ have transformed film distribution, they present significant limitations, including restricted catalogs, algorithm-driven curation, licensing vulnerabilities, and commercial prioritization over cultural preservation. Library-specific streaming options such as Kanopy and Hoopla offer limited selections, although recent studies confirm that the move toward streaming-preferred collection policies has accelerated. Moreover, research demonstrates that assumptions about the superiority of streaming are not consistently supported by evidence. Physical media provides permanent ownership, superior audiovisual quality, bonus content, and offline accessibility. A growing niche market drives sales of premium releases, while specialist distributors create and serve markets for restored classics unavailable on streaming platforms. Maintaining physical collections aligns with core library values of preservation, intellectual freedom, and equitable access. DVDs and Blu-ray Discs ensure access to cultural content regardless of connectivity or subscription costs, enabling purposeful curation over algorithmic recommendations. Libraries must continue acquiring physical film collections as democratic alternatives to commercially driven streaming services.

Introduction

For a brief moment in early June 2020, *Gone with the Wind*, a film released in 1939, held the first, eighth, and ninth spots on Amazon.com's list of film and television bestsellers for the DVD, Blu-ray Disc, and 70th Anniversary Editions, respectively. Within a few days, all copies had sold out—at one point, a second-hand Blu-ray Disc was the only version available, for $334.01.[1]

Gone with the Wind is the highest-grossing (inflation-adjusted) film of all time.[2] It is a technically brilliant production, the most ambitious motion picture made to that point, and a faithful cinematic adaptation of a beloved novel. It won eight Academy Awards, including Best Picture, Best Actress (for Vivien Leigh), and Best Director (for Victor Fleming). Hattie McDaniel won the Academy Award for Best Supporting Actress, becoming the first Black person to win an Oscar. Leigh's performance is compelling and moving; the performances by Clark Gable and Olivia de Havilland are also notable. It was my grandmother's favorite film. However, it is also too long and, in its second half, dull. It distorts

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history and did much to glorify the myth of the Lost Cause of the Confederacy. And it is racist, as Black critics have pointed out since its release, and White audiences have recently recognized.[3]

The surge of interest in purchasing physical copies of the film was triggered by the decision of HBO Max, a video streaming service, to remove access to *Gone with the Wind* during the protests following the death of George Floyd, a Black man murdered in May 2020 by Minneapolis police officer Derek Chauvin. Two weeks after its removal, the film reappeared, prefaced by an introduction from film scholar Jacqueline Stewart, who discussed its artistic achievements and racist historical inaccuracies.[4] HBO's decision sparked a moral and commercial panic, leading to a surge in sales of optical disc copies of the film. This was despite the fact that although *Gone with the Wind* was unwatchable on HBO Max in June 2020, it remained available for digital purchase or rental on other platforms, including Amazon Prime, iTunes, Vudu, Google Play, and YouTube. Anyone who wanted to watch *Gone with the Wind* online could do so.

The ethics of *Gone with the Wind's* removal and reframing have been widely discussed;[5] as fascinated as I am by the topic, I do not wish to add to that discussion here. For this paper, what matters is the hurried removal from a major streaming service and the subsequent marketplace reaction. The incident, albeit briefly and superficially, prompted many film viewers to consider how they were watching film and to rediscover the advantages of supposedly superseded formats. Simultaneously, libraries were under immense pressure to expand streaming provisions during the pandemic, and some institutions even moved toward streaming-preferred collection policies.[6] This paper challenges the resulting assumption that physical formats have become dispensable.

In the months preceding the *Gone with the Wind* furor, journalists had declared the death of both the DVD and the Blu-ray Disc.[7] The data on physical media sales and their decline in favor of streaming services support these confident statements. For well over a decade, the major corporations controlling the distribution of books, music, and film have promoted low-cost subscription models, offering immediate, inexpensive, and convenient access to cultural productions. For books and music, a countermovement has led to a resurgence, and indeed a revitalization, of physical media. It is now a golden age for the production of vinyl records and hardcovers. By contrast, commercial and consumer pushback against the commodification of film through instant-access distribution has been less visible. Perhaps this is because DVDs and Blu-ray Discs are more difficult to love than records and books. Or because our visual media ecosystem is dominated by a small number of risk-averse corporations, where, in the words of Martin Scorsese, "the art of cinema is being systematically devalued, sidelined, demeaned, and reduced to its lowest common denominator, 'content.'"[8]

The demise of physical media has been predicted for years, long before 2020. DVD sales have declined annually since 2005, while Blu-ray Disc sales have decreased annually since 2013.[9] In the quarters leading up to the COVID-19 pandemic, sales were dropping at an annualized rate of more than 20 percent.[10] Although DVD sales, but not Blu-ray Disc sales, increased during April and May 2020, sales continued to decline between 2021 and 2025. Meanwhile, subscriptions to and time spent watching streaming media are not only growing, they are accelerating, although signs of subscription

fatigue have begun to emerge as more players enter the market.[11] Netflix, Amazon Prime Video, and Disney+ have saturated the North American market and continue to add subscribers worldwide. New streaming services, often backed by the major film and television production studios, have proliferated over the past five years. DVD and Blu-ray Disc sales have declined in correlation with the expansion of these services. Many consider films on optical discs to be a superseded format destined to follow the path of the VHS videocassette. In 2024, disc sales fell below $1 billion for the first time this century.[12]

This paper offers a reflection on the market dynamics, significance, necessity, and current use of DVDs and Blu-ray Discs five years after the withdrawal of *Gone with the Wind*, the earlier media assertions, and the onset of the COVID-19 pandemic. It explores the implications for libraries of replacing physical media with streaming media. Film libraries can be expensive to acquire, difficult to catalog, and challenging to manage. They quickly lose relevance. Librarians may feel discomfort at the notion that we should collect films in the same way as we do books. For some time, the rapid emergence of high-definition streaming media services has prompted librarians to question the viability of their physical collections of audiovisual materials.[13]

The case against physical media is clear, and for many libraries and library users, the question has been settled.[14] Five years ago, the Public Libraries Association asked, "Are we reaching the end of library DVD collections?"[15] On-demand streaming video has consumed the mass market for DVDs and Blu-ray Discs; digitally distributed films are more affordable and accessible than their physical counterparts. Companies like Netflix, Amazon, and Disney are part of a global trend toward the "access economy," where goods and services are rented rather than purchased. These new delivery models, enabled by technological change, the decline of stable personal incomes during the Great Recession, and a shift toward urban lifestyles, are assumed to be more appealing to those raised in the digital age.[16]

What space, then, exists in the economy, society, culture, and the library for the DVD and Blu-ray Disc? A significant one, as this paper will seek to demonstrate. Sales of DVDs and Blu-ray Discs are indeed declining. Nevertheless, collections of DVDs and Blu-ray Discs remain an integral part of our service provision and align with our values. Evidence suggests we live in a golden age for films on physical media—I have some sympathy for this position and believe there is evidence for it. This paper argues for the continued relevance of these formats and asks librarians considering the removal of their film collections on optical disc to reflect on how this decision aligns with their collection management policies and the values of our profession.

The Rise and Fall of DVDs and Blu-ray Discs

The mid-1970s development of rival videocassette formats—VHS by JVC and Betamax by Sony—created a "format war" that stunted sales until VHS triumphed in the early 1980s. A similar conflict began to evolve in the early 1990s as two rival consortia developed competing high-density optical disc formats. An expert group of information technology industry representatives mandated convergence to a single

standard, threatening to boycott both formats if independent development continued.[17] As Taylor outlines, the DVD was the resulting compromise.[18]

The first DVD was sold in 1996 in Japan. The format was released in the United States in 1997, in Europe in 1998, and in Australia in 1999. By the end of 1997, one million discs featuring 530 film titles had been shipped to retailers. Initial sales disappointed, because not all major Hollywood studios were committed to the format, and many did not release films on DVD until 1999. Sales accelerated dramatically in 1999; by the end of the year, 100 million units had been sold. DVD rentals outperformed VHS rentals for the first time in June 2003, by which time sales of the newer format had surpassed those of the older one. Best Buy, a major retailer, ceased stocking VHS tapes in 2003, and Walmart, the world's largest company by revenue, followed suit in 2005.[19]

This surge and the revenue it generated for the major studios lasted only a decade. Of the forty-two top-selling DVDs in the United States, only one, *Frozen* (2014), has been released since 2010. *Frozen* sold 18 million DVD and Blu-ray Disc copies in the year of its release.[20] Six years later, *Frozen 2*, the best-selling disc of 2020, sold fewer than four million. A dramatic reduction in DVD sales during 2018's "Christmas from Hell" was blamed for the closure of HMV, once the UK's largest music and film retailer.[21] Sales of Blu-ray Discs have been declining more slowly than DVDs, but from a lower base. Outside of North America, the medium never took off as a mass market product.[22] An increasing number of films are being released on DVD, but not on Blu-ray Disc.[23] Many are no longer released on physical formats at all; Netflix has a policy of not releasing the films it produces or distributes on physical media, and most Apple TV+ content remains exclusive to its streaming platform, with limited availability in physical formats.[24] Samsung, which released the first Blu-ray Disc player in 2006, announced in 2019 that it would no longer develop new Blu-ray Disc players for the US market despite being the market leader.[25] John Lewis, one of the UK's largest department store chains, stopped selling stand-alone DVD players in 2018.[26] Today, only a handful of technology companies produce DVD and Blu-ray Disc players. Just before this paper was finalized, Pioneer, recognized for its premium optical disc drives, exited the market.[27]

The Rise, and Current Dominance, of Streaming Video

The reason for the decline of DVDs and Blu-ray Discs is clear to anyone with even the mildest interest in film. Digital distribution, as evidenced by the rise in popularity and economic power of on-demand video streaming services, has consumed the market once occupied by the two optical disc formats. For the price of a single disc, and less than the cost of a cinema ticket, subscribers can obtain month-long access to a streaming service and watch as many films as they like. On-demand videos cannot be scratched, dropped on the floor, fall behind the sofa, or loaned to an unreliable friend. You do not have to put them back in a box, think about where to shelve them, or decide whether or how to interfile your DVDs with your Blu-ray Discs. Your children cannot decorate them with smudgy fingerprints or attempt to balance them on their heads. Streaming services are affordable, convenient, and filled with addictive and exciting programming.[28]

Netflix was founded in 1997 as a rent-by-mail DVD business. Even in its pre-streaming iteration, Netflix had a profitable business model—by 2009, 1.3 percent of all mail sent in the United States consisted of Netflix DVDs.[29] Over three decades, it has evolved into the world's most powerful film and television production and distribution company, using on-demand video as a profitable revenue stream. In Q4 2024, Netflix surpassed 300 million subscribers with a quarterly revenue of $10.25 billion, exceeding expectations.[30] Aggressive expansion, strategic deal-making, and an early move into content creation have made it the streaming video service that continues to set benchmarks for the industry.

In less than a decade, Netflix has transformed the creation and distribution of film and television. In 2013, *House of Cards* was the first show produced by Netflix.[31] *Beasts of No Nation* was the first film exclusively distributed by Netflix in 2015. By 2021, the company was spending more than $17 billion on original content creation, an annual figure it has since maintained (except for a dip in 2023).[32] At the peak of its nascent dominance in the streaming sector, films produced or distributed by the company received 36 nominations at the 2021 Academy Awards—depending on how "production" is defined, this was the second or third highest number in the Awards' history.[33] At the 2021 Emmy Awards, Netflix productions received an astonishing 129 nominations, winning 44 awards, the most any company has received in a single year.

Amazon expanded from books to video by 1998. At the time of writing, Amazon competes with Apple, Microsoft, Nvidia, and Alphabet to be the world's most valuable company by market capitalization. It is the second-largest employer in the United States, the leading e-commerce platform, and a major player in fields such as cloud computing and artificial intelligence. Its on-demand video streaming service has undergone several iterations. Launched in 2006, Amazon Unbox transitioned to Amazon Video on Demand (2008), then Amazon Instant Video (2011), and finally Amazon Video (2015). This service, commonly known as Prime Video, offers Amazon Prime subscribers complimentary access to thousands of films and TV shows. The number of subscribers is uncertain—Amazon has always been reticent about divulging commercially sensitive data. But in a 2021 letter to shareholders, Amazon CEO Jeff Bezos stated that Prime had surpassed 200 million global subscribers. Amazon now plays a prominent role in film and television production through Amazon Studios and by distributing content via Amazon Originals.[34] Amazon Video differs from Netflix in that it also hosts live sporting events and offers content from other providers through add-on subscription channels. Most films and shows on the site are not free; digital copies must be rented or purchased. Amazon's various services and technologies form a complex ecosystem; on-demand video is only a part of this system, and analysts remain uncertain about the importance of streaming to Amazon's corporate objectives. As Bezos has stated: "We get to monetize [our subscription video] in a very unusual way. . . . When we win a Golden Globe, it helps us sell more shoes."[35]

Disney+ launched in the United States and Canada in November 2019, expanding into European and Latin American countries throughout 2020. On its first day, it gained more than ten million subscribers; by October 2021, this number had grown to more than 118 million. Disney+ primarily focuses on distributing Disney's own films and shows; therefore, it has fewer productions available to watch than

its two main rivals. However, aggressive expansion throughout the 2010s means that Disney holds the rights to two of the most successful franchises in film history—Star Wars and the Marvel Cinematic Universe. It also owns the animation studio Pixar and 20th Century Studios (formerly 20th Century Fox), with its library of landmarks in cinema history, from *The Sound of Music* (1965) and *Cleopatra* (1963) to *Alien* (1979) and *Avatar* (2009). Even without these acquisitions, the Disney archive would still be an enviable commercial property, containing 500 films and 7,500 television shows, many of which had never been made available through Netflix, Amazon, or their rivals.[36]

Unlike Netflix and Amazon Prime Video, which offer extensive selections of original and licensed films and shows, Apple TV+ features content that Apple has produced or commissioned. As indicated by its name, the platform focuses on shows, although it also hosts a small number of high-profile films. Although its library is smaller than its competitors, Apple TV+ stands out because of its high-quality productions and its curated viewing experience. Other significant players in the North American streaming video market include Hulu (now part of Disney), Paramount+, Peacock, HBO Max, and STARZ.

Complex legal limitations and commercial agreements lead to variations in the availability of on-demand video streaming across different countries and regions. Although not strictly an on-demand service, the BBC's iPlayer competes with Netflix and Amazon in the United Kingdom by allowing British television license payers to watch content recently broadcast on the various BBC television stations and has broadened its offerings over the last decade to include classic programming. Beyond North America and Europe, numerous regional streaming services have emerged, catering to local preferences and consumption habits. They offer language-specific programming, distinctive cultural content, and, often, hybrid distribution methods. In India, JioHotstar and Zee5 host both international and local films, along with a range of shows and live sports, particularly cricket. In China, services such as iQIYI, Tencent Video, and Youku dominate the market. Given the challenges faced by Western firms, no major American firms will be permitted to enter the Chinese market in the medium term.

Within libraries, too, streaming is now firmly established. Levenson and Lombardo have reviewed the current state of practice and find that streaming represents the dominant mode of audiovisual access in higher education, even as affordability, licensing, and sustainability remain concerns.[37] Their survey of the field provides crucial context: even as libraries increasingly build collections around streaming, questions remain about the long-term viability of these strategies, especially in relation to equitable access.

The Failures of Streaming Video

These facts diminish the importance of DVDs and Blu-ray Discs to film culture and to the libraries that provide access to that culture to their users. But they do not make the optical disc an irrelevant or obsolete format. Just as ebooks did not eliminate paperbacks and hardbacks, streaming video has

transformed the film ecosystem without leading to the extinction of DVDs and Blu-ray Discs. There are reasons to continue buying and watching films on optical disc, but there are also reasons why streaming video fails film viewers, whether they be cineastes or casual fans. Before discussing the reasons why optical discs might be preferred over streaming video, I will reflect on the limitations of Netflix, Amazon, Disney+, and their competitors.

The key limitation of streaming video lies in the narrow, commercially curated, and restricted access provided to subscribers. It is easier to watch *a* film than ever before, but the ability to choose *which* film to watch has become more difficult. Streaming video is not like streaming audio—for both, recommendation algorithms purposefully restrict choice. But the choice available to listeners of Apple Music, for example—more than 100 million songs—is on a different scale to the choice available to viewers on Apple TV+—only about eighty films.[38] This difference in scale is purposeful and part of the business model of the streaming platforms. Netflix and its rivals have a different operating model from Spotify and its rivals, and not only because there are far fewer films than songs. Video streaming services are limited both by accident and by design. They are intended to narrow choice, providing the consumer with a kind of Goldilocks content that, in the words of an *Economist* article, is "neither too familiar nor too novel."[39]

It is worth comparing the two earlier-mentioned services. Spotify has established partnerships with all the major record labels, as well as thousands of independent labels and distributors. This extensive network grants it access to most commercially available songs across a wide range of genres and eras. If a song has been released by a major label, or many indie labels, you will find it on Spotify in almost all cases. Film rights tend to be more fragmented—across studios, distributors, and regional licensing arrangements—complicating the ability of any streaming platform to provide a film library with any degree of comprehensiveness. Netflix restricts the number and availability of the films it offers to control costs, maintain exclusivity, and rotate its content to keep its catalog looking fresh and competitive. Unlike music streaming, the availability of films on video streaming services is selective and constantly evolving.

Although the number of songs available for streaming via Spotify has increased over time, the number of films on Netflix has decreased.[40] And though Amazon's library is growing, many of the films available for Prime subscribers to watch for free are low-budget, often poor-quality versions of films that are out of copyright. Most streaming films on Amazon need to be purchased, regardless of whether you are a Prime member. Currently, Amazon offers 13,000 films free to its North American subscribers, Netflix offers 3,700, and Disney+ offers 500, with most being their own productions.[41] At its height as a mail-order DVD service, Netflix provided access to 70,000 titles.[42] This represents a 95 percent reduction in available titles.

This shift highlights the trend, noted earlier, toward producing exclusive content rather than licensing third-party films. Disney's former chief executive, Michael Eisner, noted that Netflix's chairman, Reed Hastings, "created a business strategy and that was buying everybody's library. Everybody agreed to sell their library to him which was probably a mistake for them but they made a lot of money on it and

it kept a lot of companies afloat."[43] As films were withdrawn by studios setting up their own streaming services, Netflix produced more of its own content. Since 2022, more than half of its offerings have been original productions, generated in response to the removal of content from studios with their own platforms.[44] Furthermore, these companies were spending billions of dollars on mergers and acquisitions, partly to gain exclusive access to intellectual content, ensuring Amazon and Netflix could not license it. In essence, Netflix was spending tens of billions creating films and shows for their service, while Disney was spending tens of billions to keep content off these services. Over time, this has resulted in fewer choices—both in quantity and variety—as streaming services produce generic content manufactured to attract the broadest audience.

As a for-profit company, Netflix strives to maximize revenue by delivering what customers want. Netflix and Amazon have a corporate interest in catering to audiences rather than challenging them. Netflix has faced criticism for limiting the creativity of writers and directors. However, it is unclear whether these limitations are stricter than those imposed by traditional film and television production companies. Netflix and Amazon produce content, not art; *Vanity Fair* journalist Nick Bilton has expressed a concern that cinema and television are being replaced by "digital wallpaper."[45] Films with small, niche audiences are often overlooked, as are films that may not have immediate commercial appeal. Finding the right platform to watch a film that is not currently being marketed can be difficult. Acknowledging that he is overwhelmed with content, but lacking choice and agency in his film watching, critic Adam Bowie has noted: "What I don't know is where I can watch *Inception*, or *Star Wars*, or *Psycho*, or *Gone with the Wind*, or *Bringing Up Baby* on any given day. Are they on Netflix or Amazon? Maybe. Maybe not."[46] Physical collections eliminate this uncertainty.

The Benefits of DVDs and Blu-ray Discs

For years, DVDs, like the VHS tapes before them, served as a means for film studios to continue profiting from their productions at low cost, long after a film's theatrical run. DVDs were highly profitable for film studios and distributors—indeed, usually more profitable than earnings from a film's cinematic release. Theatrical revenue accounted for 55 percent of an average film's revenue in 1980, but only 20 percent by 2007. Most of the remaining 80 percent was generated from the sale and rental of home entertainment releases.[47] Profit margins on DVD sales were twice those of VHS, while more expensive Blu-ray Discs generated even greater profit for producers and distributors—there is little difference in the production costs for different forms of optical media.[48] Moving consumers from physical to digital media further reduced distribution costs. Stephen Silver has suggested that the COVID-19 pandemic allowed cynical studio executives to move away from physical media even faster and implement aggressive plans to launch new streaming platforms at a time when their customers were distracted and vulnerable.[49] As Heller and Salzman have written, Disney has long been an expert in engineering ownership and non-ownership to maximize profit.[50]

The first DVDs sold in the United States were priced at a discounted rate of $24.99 (equivalent to $42.69 at the time of writing). Prices have been declining for twenty-five years. For box-office hits, film

producers no longer seek significant profit from film sales on disc, and consumers show less interest in viewing films via these formats, which reduces demand and thus the price. Both buyers and sellers have moved online, where films can be accessed more easily and inexpensively, benefiting both parties. Producers accept low profit margins on the discs they still sell because cheap DVDs near supermarket checkouts often serve as miniature billboards for theatrical sequels, toys, clothes, lunchboxes, and cereals in nearby aisles, as well as spin-off shows on Netflix and Disney+. The DVD has become a disposable commodity. Thrift stores are filled with them. During the COVID-19 pandemic lockdowns and the clearances they inspired, it was common to see boxes of DVDs on the footpaths of my neighborhood, free to a good home.

When Christopher Nolan's *Oppenheimer* appeared on the high-resolution 4K Ultra HD Blu-ray format in November 2023, all copies sold out within a week.[51] Nolan—along with directors James Cameron, Guillermo del Toro, and Edgar Wright—has encouraged film fans to purchase optical disc versions of their films rather than watch them on streaming services. In Nolan's words, there is value in "a version you can buy and own at home and put on a shelf so no evil streaming service can come steal it from you."[52] Streaming has suppressed DVD and Blu-ray Disc sales, but sales figures are only part of the story of these formats and may not signal the impending end of optical discs.[53] A niche market for DVDs, and particularly Blu-ray Discs and the higher-resolution 4K UHD format (whose sales have been rising), has been quietly developing for a decade, expanding as the mass market has declined.[54] A British news magazine may have put it hyperbolically, though not unjustifiably, when it declared, "Don't believe the sales figures—DVDs are thriving."[55] The pushback against streaming media is real, and it is both principled and practical.

DVDs and Blu-ray Discs serve a different purpose than streaming video for cinephiles and fans of classic films, as well as the companies that cater to them. Streaming services have little interest in older films; finding many such titles on Amazon Prime can be challenging, while you may struggle to find any on Netflix. Production companies that own the rights to these films are increasingly granting access to their archival material to niche DVD and Blu-ray Disc distributors. These distributors restore these high-quality films, package them superbly, and offer features that help film enthusiasts contextualize and understand them. Film fans are willing to pay a high price for these products. Prominent distributors of older and arthouse films include Criterion Collection, Arrow Video, BFI, and Eureka's Masters of Cinema. The market is also thriving thanks to smaller distributors such as Kino Lorber, Indicator, and Vinegar Syndrome. Of course, some films are too niche even for these labels, and restoration and release incur costs. However, for many films, particularly older ones, optical discs have become the only means of viewing them, and thanks to the high quality of the restorations, the viewing experience has never been better. Optical disc formats also offer advantages in accessibility, providing consistently available and standardized closed-captioning options. These features are often implemented inconsistently, or are missing, on streaming platforms. Closed captioning displays on-screen text that reproduces spoken dialogue and relevant non-speech audio, such as music cues, sound effects, and speaker identification, ensuring greater accessibility for deaf and hard-of-hearing viewers.

Blu-ray Disc and the higher-resolution 4K format are still the gold standard for picture and sound quality. The streamers have been catching up, but only for newer releases. For older films, versions on optical disc are nearly always superior to those on streaming platforms, if they are present on those platforms at all. DVDs and Blu-ray Discs offer several advantages, including bonus content such as commentary tracks and special features, which are sometimes available on Disney+, but never on Netflix or Amazon. Additionally, they provide permanence of ownership and reliable offline accessibility. When you own a disc, you own a disc. You can trust that you can watch it whenever you want and learn more about the films you love by watching the bonus features. When you subscribe to a streaming service, you own nothing, and the films you want to watch are liable to be removed at short notice. Even purchasing a film on a service like Amazon comes with a risk. A notable incident occurred in 2009 when Amazon remotely deleted copies of George Orwell's *1984* and *Animal Farm* from Kindles due to rights issues, demonstrating how digital "ownership" can be revoked without warning. Purchasing via video-on-demand is merely a form of licensing, and purchases may be lost if a distributor is ever acquired, merged, ceases operation, or goes bankrupt. Having a physical item allows for a tangible connection—holding it, touching it, or placing it on a bookshelf; this greater physical engagement enables greater emotional and intellectual engagement. Streaming services depend on reliable internet connectivity and will feature compressed video, most visible in dark scenes, causing sunsets (for example) to look blocky and pixelated. The sound on streaming video is also compressed; on optical media, it is lossless. These limitations raise questions about whether digital streaming should ever fully replace physical media in libraries, especially for patrons seeking high-fidelity content, older and rare titles not offered by commercial services, or equitable access unhindered by bandwidth constraints.

In any case, none of the major commercial streaming services offer subscription models to libraries, and those that do provide a more limited selection of films, a challenge that has been recognized for some time.[56] The most notable service is Kanopy, which offers a curated selection of independent films, classic cinema, documentaries, and educational materials. Kanopy's content focuses on the film ecosystem's more intellectual and artistic corners, with many titles sourced from the Criterion Collection, PBS, and independent arthouse distributor A24. By contrast, Hoopla Digital, operated by Midwest Tape, offers a broader and more commercial selection, including mainstream films and television shows. Whereas Kanopy uses a quota-based access model, Hoopla allows simultaneous access but imposes borrowing limits. It also functions on a transactional model, which may pressure library budgets. The third major player in the market is OverDrive, whose Libby app is known for ebooks and audiobooks; its content tends to be more limited and focused on niche, independent, or educational genres. Less widely adopted, Swank Digital Campus is a streaming media vendor offering a fairly large and diverse catalog, and is a growing player in the academic library market. Compared with major commercial streaming platforms, library streaming services lag in diversity, consistency, and user experience, and they do not make substantial investments in licensing popular titles or creating exclusive content. Moreover, assumptions that users inherently prefer streaming are not consistently supported by evidence. At Penn State University, DVD circulation sometimes exceeded streaming usage of identical titles on Kanopy, contradicting assumptions about universal streaming preference and demonstrating persistent patron

demand for physical formats.[57] It is unclear whether these usage patterns are isolated to this institution or are part of a broader trend, but it offers evidence that complicates the narrative of streaming's inevitability and supports the argument that physical formats continue to serve critical user needs.

The Values of Librarianship

In his 1946 essay, "Books v. Cigarettes," George Orwell argued that books, then regarded a luxury, were more economical than cigarettes over time because they had lasting significance and were collected rather than consumed and forgotten.[58] The same logic remains relevant today for DVDs and Blu-ray Discs, which may appear to be a costly investment for individuals or libraries, but prove more cost-effective than streaming subscriptions when viewed over the medium to long term. An optical disc enables permanent access to a film, eliminating the need for third-party services. Similar arguments have been made for music collections, where physical formats like vinyl have experienced a revival, suggesting that the perceived obsolescence of discs may be overstated across different media.[59]

In addition to economic considerations, the cultural importance of physical media aligns with some of the key values of librarianship, including preservation, intellectual freedom, privacy, and access. Streaming services emphasize consumption rather than collection; they encourage passive and forgettable viewing of fleeting content shaped by engagement algorithms. By contrast, a well-managed library prioritizes selecting, preserving, and revisiting physical media based on cultural, personal, or scholarly value. Librarians facilitate democratic access to cultural works; they are not just content distributors. Depending on streaming platforms, with their ever-changing catalogs and algorithm-driven control, undermines our social role. Libraries should continue to collect and preserve physical media, in doing so serving as a buffer against the impermanence of digital content.

Exploring tactile physical media collections in person offers a more meaningful and fulfilling discovery experience than anything provided by algorithm-based streaming platforms. DVDs and Blu-ray Discs are things you can hold, see, and touch. Curation by librarians, and library user borrowing, is purposeful and intentional; it encourages serendipity and cultural risk-taking. As Rachel P. King points out, unrestricted access to physical media in libraries can boost user satisfaction and encourage exploration.[60] In a marketplace where streaming services and rights owners alter the content of their films to update the special effects, remove language and content judged as inappropriate, adjust aspect ratios to fit the bestselling televisions better, or alter any aspect of a film at the whim of a director, producer, or studio executive, optical discs can freeze a production in time, ensuring its artistic integrity. As noted earlier, streaming services have many drawbacks, including licensing limitations and variable availability, which hinder persistent access to many films.[61] Commercial and licensing imperatives can and do make films disappear, without explanation, from streaming services in unpredictable and arbitrary ways.[62] Libraries, by contrast, aim to maintain consistent, accessible, and diverse collections, ensuring reliable access to a wide variety of films, including rarer, older, and harder-to-find titles.

The typical American spends more than $500 annually on streaming service subscriptions.[63] Not every American can afford this, or even afford a Netflix subscription, and pricing models that used to be

simple are now complex, with tiered subscriptions for multiple users and access to higher-definition or ad-free content. People who cannot afford to watch the latest Marvel film, the latest season of *The White Lotus*, or *Andor* may feel excluded from a culture they want to engage with. Should the library not enable it if there is an easy and inexpensive way to provide free access to this culture for anyone who wishes to do so?

Conclusion

In June 2020, the brief surge in demand for physical copies of *Gone with the Wind* was more than just a market curiosity; it was a revealing moment that exposed an underappreciated fragility in our digital film ecosystem. Making a cultural landmark temporarily inaccessible on a major streaming platform caused viewers to instinctively reach for the permanence and certainty that physical media provides. Occurring at the height of pandemic-driven streaming consumption, this episode inadvertently demonstrated that reports of the death of DVDs and Blu-ray Discs had been exaggerated.

Although the mass market for watching films has migrated to streaming services, physical media serves distinct and irreplaceable functions that align with the values of our profession. The success of smaller distributors like Criterion Collection and Arrow Video, the sold-out release of 4K copies of *Oppenheimer*, and the activism of directors advocating for physical ownership point to a medium that has found new purpose rather than faded into obsolescence. For libraries, the choice between physical and streaming media should not merely be a practical decision about space, budgets, or patron preferences, and it should not be framed as a binary choice. For all their convenience and affordability, streaming services operate according to commercial imperatives that are at odds with library values. When we outsource our film collections to Netflix, Amazon, and Disney+, we cede control over what our communities can access, when they can access it, and under what conditions.

DVDs and Blu-ray Discs, by contrast, embody the principles of permanence, equity of access, and intellectual freedom that define our profession. They ensure that films remain available regardless of corporate strategy, licensing disputes, or shifting cultural sensitivities. They provide the highest quality viewing experience for classic and arthouse cinema, which streaming services largely ignore. They offer the serendipitous discovery that browsing library shelves allows, free from the recommendations of algorithmic curation. And they democratize access to visual culture, ensuring that economic barriers do not exclude members of our communities from participating in shared cultural conversations.

Just as we would not consider replacing our book collections with subscriptions to Kindle Unlimited, we should be cautious about abandoning optical discs in favor of streaming services that offer less choice, lower quality, and no guarantee of continued access. Although these services kept us entertained during lockdowns, they also revealed their dependence on corporate goodwill, reliable internet connectivity, and monthly subscription fees. Libraries that maintained their DVD and Blu-ray Disc collections could continue serving patrons regardless of bandwidth limitations, subscription costs, or licensing changes.

While studies such as Serrano and Fernandez illustrate the appeal of streaming-preferred policies during crisis conditions, they also highlight the risks of overreliance on licensed access.[64] Also, Proctor's findings on user demand for DVDs complicate the narrative of streaming inevitability, and Levenson and Lombardo remind us that the current dominance of streaming in libraries is not without significant unresolved challenges.[65] Together, this scholarship demonstrates that physical and digital media should not be positioned as mutually exclusive, but as complementary forms of access. For libraries, the choice should be guided not only by efficiency and convenience but by the enduring values of permanence, accessibility, and intellectual freedom.

Five years after the *Gone with the Wind* incident, the case for physical media has strengthened as subscription fatigue sets in and streaming services consolidate around ever-narrower content strategies. Librarians considering the future of their film collections should not ask whether DVDs and Blu-ray Discs are commercially viable in the mass market, but rather whether maintaining these collections serves the values and mission of our institutions. The answer, this paper suggests, is unequivocally yes. Libraries that preserve physical media collections provide their communities with something increasingly rare and valuable: the assurance that cultural works will remain accessible, complete, and unaltered, available to anyone who seeks them out.

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Creating an Online Arabic/English Thesaurus Based on Linked Data

Magda El Sherbini

Introduction

Many North American library catalogs support title, author, and keyword searching in multiple scripts. When it comes to subject searching, however, these systems provide access primarily to controlled English-language subject headings and thesauri, such as the Library of Congress Subject Headings (LCSH). In much of the cataloging for items in languages not written in Roman script, English-language subject access provides insufficient description of the content to ensure the retrieval of the item. Some concepts that function in other languages or cultures do not have English equivalents. In such cases, catalogers are instructed to select a controlled vocabulary subject heading that is "close enough" or "broader." On the other hand, a user searching for a book written in a specific language about a specific subject should be able to conduct a subject search in that language if preferred. The need for multilingual information access has been addressed in many forums for several years. The Association for Library Collections and Technical Services (ALCTS) Non-English Access Committee indicated that research around assigning subject headings in the language of the script would enable users and scholars to find library materials more efficiently. That committee also found that LCSH does not sufficiently represent the cultures of the non-English-speaking countries and, subsequently, the non-English collections. Several examples of the deficiency of LCSH coverage in these areas illustrate the need to use subject headings in the language of the script. In this Communications on Practice piece, I address three issues: LCSH and its coverage of subjects; enhancing the discoverability of foreign language materials, specifically Arabic materials, by adding non-English subject headings; and enabling users to access the Library of Congress (LC) Subject Authority File to access "See" and "See also" cross-references through linked data.

Literature Review

A rich body of literature addresses LCSH coverage of non-Roman subjects. A good number of these scholarly works call for applying subject headings in the language of the script, as well as adding subject headings from another thesaurus when available.

Many North American library catalogs support title, author, and keyword searching in scripts. When it comes to subject searching, however, these systems provide access primarily to controlled English-language subject headings and thesauri, such as the LCSH. For items written in non-Roman script,

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English-language subject access often provides an insufficient description of the content to ensure the retrieval of the item. Some concepts in other languages or cultures do not have English equivalents. In such cases, catalogers typically select a controlled vocabulary subject heading that is "close enough" or "broader." On the other hand, a user searching for a book written in a specific language about a specific subject should be able to conduct a subject search in that language if preferred. Several authors addressed the issues of providing access to the catalog by subject in multiple languages. James Agenbroad offered an extensive historical overview of Romanization in library catalogs.[1] He identified institutional policy and cataloging standards, not technical feasibility, as the major obstacles to implementing script access points. Joan M. Aliprand also pointed out that Romanization is inadequate for providing access to materials in scripts. Romanization is "Information distortion."[2] Aliprand pointed to the need for "locale-specific" access points, determined by the user's preferred language and written in the proper script. She also advised that authority files present multiple script access points.[3]

Researchers continued to identify opportunities to use script subject headings in addition to using LSCH. In "Models for Multilingual Subject Access in Online Library Catalogues," Ron Davies described the two models used by the International Labor Organization (ILO) to provide users with subject access in languages of their choice.[4] In the first model, subject terms were translated on the fly when catalog records were accessed during search, display, or export. In the second model, descriptors were translated into a batch process after being entered into the bibliographic record and the equivalent descriptors in other languages were entered into the bibliographic record. Each of these models has advantages and disadvantages in terms of data storage, indexing, and translating. Jung-ran Park addressed name and subject access across languages and cultures.[5] She examined current mechanisms for cross-lingual name and subject access, and identified major factors that hinder cross-lingual information access. For example, the author looked at converting concepts expressed in Korean into English LCSH subject headings. She pointed out that mapping Korean names and subjects to their English counterparts is exceedingly difficult due to different linguistic structures and sociocultural norms. In the case of English and Korean, these structural differences are considerable, unlike those between English and other Western languages, because English and Korean are unrelated languages. Moreover, "word segmentation and transliteration schemes dealing with scripts also play a part in limiting access to cross-lingual and cross-cultural resources."[6] Patrice Landry discussed this issue in "Multilingual Subject Access: The Linking Approach of MACS" by exploring solutions to multilingual subject access to online catalogs.[7] The strategy was to develop a web-based link and search interface through which equivalents between three controlled vocabularies for subject headings—SWD/RSWK (Schlagwortnormdatei/Regeln für den Schlagwortkatalog) for German, RAMEAU (Répertoire d'Autorité-Matière Encyclopédique et Alphabétique Unifié) for French, and LCSH for English—allow users to access online databases in the language of their choice.[8]

Providing simultaneous access to multiscript subject headings has been recognized as an issue to be solved by the ALCTS Task Force on non-English Access as far back as March 2007.[9] Although many libraries developed substantial foreign language collections, the language of the library catalog and

its subject access points has nonetheless remained English.[10] I began to study this topic in 2010 after being appointed to serve as Chair of the ALCTS Steering Committee to Oversee the Implementation of the "Recommendations Contained in the Report of the ACLTS Task Force on non-English Access 2007-2009."[11] The report included eleven recommendations. The Steering Committee was successful in implementing ten of the recommendations, but recommendation number eleven, "Assign the ALCTS Subject Analysis Committee (SAC) working with appropriate library organizations to study the needs of library users for multilingual subject access in the appropriate script(s), and to propose steps to address those needs," was not implemented.[12] The ALCTS Steering Committee members explained the reasons for not implementing recommendation eleven in these terms: "this recommendation was extremely vague and broad; a research project that might never be completed; is outside SAC's scope; SAC doesn't do much research on end users or their needs," and finally, "more research is needed."[13]

In a survey conducted in 2011, the authors assessed the need to provide multilingual subject access to online library catalogs.[14] The results of the survey indicated that end users were not completely dissatisfied with the current library catalog, but end users and librarians wanted a system that is more open to multilingual subject headings. The findings highlighted areas of opportunity for libraries to make significant improvements to the catalog. Following this research, the author received a grant to study the Bibliotheca Alexandrina (BA) multilingual catalog, which provides access to their collections in three languages (Arabic, English, and French).[15] This research revealed that the BA is using the LC MARC 21 Model B, where the transcribed text in the bibliographic record is entered only in the script in which it appears. Subject access is recorded based on the authorized thesaurus in each language. For example, the French thesaurus "RAMEAU" would be used for assigning subject headings for a book in the French language.[16]

Enhance the Discoverability of Non-Roman Materials by Adding Non-Roman Subject Headings

Information gathered from the work on the ALCTS Steering Committee and the author's research in this area gave birth to the idea of internationalizing The Ohio State University Library (OSUL) catalog. Three factors made this development possible:

- RDA (Resource Description and Access) was written with internationalization in mind
- The OCLC FAST (Faceted Application of Subject Terminology), which is derived from the LSCH but applies a simpler syntax while retaining the richness of the LCSH vocabulary
- Users' desire to search the library catalog by subject terms in their preferred language (e.g., Arabic, Chinese, or Japanese)

A detailed description of the pilot project can be found in a paper presented at the 2016 International Federation of Library Associations (IFLA) conference.[17] The pilot project allowed users to access the

catalog by subject in their preferred languages. The subject terms were taken from international open source–controlled vocabularies, including:

- Chinese Subject Headings Standard[18]
- Ndlsh: governed by Japan National Diet Library and freely available[19]
- Qā'imat ru'ūs al-mawḍū'āt al-'Arabīyah al-qiyāsīyah lil-maktabāt wa-marākiz al-'ulūmāt wa-qawā'id—print thesaurus[20]
- *Sharing* Linked Open Data[21]

In this process, the cataloger assigns the LCSH terms as normal, converts them to FAST, and then finds the equivalents of FAST terms in the International Thesaurus. The following examples illustrate this process.

This process enables OSUL to record subject terms from international, online controlled vocabularies. There is no online Arabic thesaurus, however. Arabic catalogers used the terms from a print Arabic subject headings list, such as <u>Qā'imat</u> ru'ūs al-mawḍū'āt al'<u>Arabīyah al-qiyāsīyah</u> <u>lil-maktabāt</u> wa-<u>marākiz al-'ulūmāt</u> wa-<u>qawā'id.</u> This process is exceedingly difficult and time-consuming for the cataloger and resulted in slower processes and gradual accumulation of backlogs. In some cases, mapping of Arabic subjects to their English counterparts is difficult, because the two languages reflect distinct and unique cultures and traditions. In the case of English and Arabic, these structural differences are considerable. For example, the term "Amazigh" (**أمازيغ**) does not existist in LCSH; instead, the term "**Berbers**" was used. LCSH does not provide the term "**Du'a'** – **دعاء**"; the term "**Prayers - صلاة**" was used instead. Even with the term "**Du'a'** – **دعاء**" there are several variations in the Arabic language. For example, there is Du'a' al-Baha **البهاء (دعاء)** ، Du'a' al-Faraj **(دعاء الفرج)** ، etc. LCSH used God (Islam), but the Arabic language used "Allah" instead. Another Arabic term that does not have an equivalent in LCSH is the term "Ashūrā," which is unsatisfactorily represented in LCSH as "Tenth of Muharram."

Developing the Arabic Thesaurus Based on Linked Data Approaches

Philosophy of Designing an Arabic–English Thesaurus

The development of an Arabic–English thesaurus is guided by principles of equity, cultural sensitivity, and conceptual clarity. This work goes beyond mere translation, treating Arabic and English as equal partners in representing knowledge. It is concept centered rather than word centered, emphasizing the accurate expression of ideas over literal equivalence. When exact matches are unavailable, the thesaurus employs broader, narrower, or related terms, accompanied by scope notes and explanatory references, to preserve transparency and acknowledge cultural and linguistic uniqueness.

Structurally, the thesaurus is designed to maintain semantic parity between both languages. Hierarchical, associative, and equivalent relationships are preserved, enabling users to navigate concepts across cultural frameworks. Controlled vocabulary such as the LCSH serves as a starting point but is critically adapted and expanded to incorporate culturally specific concepts unique to the Arabic

tradition.[22] Additional resources, including FAST and the Art & Architecture Thesaurus, provide models for faceted classification and culturally precise terminology, guiding the structure and design of this thesaurus.[23]

This work is conceived as a dynamic and evolving resource. As languages and societies change, the thesaurus integrates contemporary terminology while honoring the rich intellectual and lexicographic heritage of Arabic. By adhering to international standards such as ISO 25964 for thesaurus construction (International Organization for Standardization 2011, 2013) and the Simple Knowledge Organization System (SKOS) for linked data (World Wide Web Consortium 2009), the thesaurus ensures interoperability with library catalogs, digital repositories, and global knowledge systems.[24]

This Arabic–English thesaurus functions as more than a retrieval tool. It serves as a cultural bridge, fostering meaningful exchange between linguistic traditions and enabling more inclusive participation in the global flow of knowledge. By blending tradition with innovation, it exemplifies the enduring value of multilingualism in organizing and sharing human understanding.

The author created the digital Arabic Thesaurus to enhance access to Arabic library materials by subject, make the thesaurus available globally, and facilitate active community participation in suggesting terms.

Methodology

The project began by researching how to create a thesaurus. Several articles provided guidance on this process, including "Guidelines on How to Create Effective Thesaurus Concepts" by Martin Doerr, Maria Daskalaki, and Lida Harami.[25] In this work, the authors discussed target terms, broader terms, narrower terms, good and bad terms, as well as source terms. The recommendations presented in the paper were helpful, especially the discussion of term selection and the list of sources.

The project started with the decision to use English authority words as the foundation. When Arabic terms could be matched to English terms, they were linked to the English authority records. For this purpose, LCSH, OCLC FAST, and Wikipedia were used as authority sources, with OCLC FAST serving as the primary tool for searching and selecting subject terms appropriate for the Arabic collection.[26] This strategy was adopted for three reasons: (1) FAST is postcoordinated, providing simple subject terms ready for cataloger use; (2) it offers "See also" references to related subjects; and (3) each FAST term is linked to the LC Authority File, which typically contains variants, broader, narrower, and related terms. Many FAST terms are also connected to Wikipedia when available.[27]

A key objective was to construct a thesaurus that is both comprehensive and detailed. To achieve this, broad categories of knowledge were identified and defined. A review of existing printed Arabic subject thesauri was also conducted. The initial stage of the project focused on essential fields of knowledge, including Islam, the Qur'an, politics, history, social studies, education, birds, fish, languages, sociology, philosophy, family, diseases, and agriculture.

Programming

The technical design of the thesaurus required careful selection of programming languages that would support efficient loading, updating, and searching of the database. Flexibility was a major requirement to ensure that the program could meet long-term objectives. Another important decision was to make the thesaurus globally accessible, which required the identification of a reliable cloud storage service and the selection of a commercial hosting domain. GoDaddy was chosen as the hosting provider because of its flexibility, ease of use, security, and immediate technical support.[28]

In developing the thesaurus, consulting Arabic subject lists was an essential step. Several authoritative resources were reviewed and integrated, including *al-Maknaz al-Kabīr: Muʻjam Shāmil lil-Majālāt wa-al-Mutarādifāt wa-al-Mutaḍāddāt* by Dr. Aḥmad Mukhtār ʻUmar and his team; *Qāʼimat Ruʼūs al-Mawḍūʻāt al-ʻArabīyah al-Qiyāsīyah lil-Maktabāt wa-Marākiz al-ʻUlūmāt wa-Qawāʻid al-Bayānāt* compiled by Shaʻbān ʻAbd al-ʻAzīz Khalīfah; *Ruʼūs al-Mawḍūʻāt al-ʻArabīyah* prepared by the Cataloging and Classification Department under the supervision of Nāṣir Muḥammad al-Suwaydān; *Oxford Dictionaries: Arabic*; and *Qāʼimat Ruʼūs al-Mawḍūʻāt al-ʻArabīyah* by Ibrāhīm Ahmad al-Khzindar. Additional subject resources included the University of Wisconsin's *Arabic Vocabs: Politics*, the *English to Arabic Government* glossary, and the *Encyclopedia of Islam and the Muslim World*.

Design and Content of the Multilingual Thesaurus

The following points outline the design principles and content features of the Multilingual Thesaurus:

- **Arabic term integration:** Each Arabic term is linked to one or both LCSH and OCLC FAST authority records, as well as Wikipedia entries when available.
- **Boolean search capability:** Users can refine and combine search results through Boolean operators.
- **Multilingual scope:** Terms are currently provided in both English and Arabic, with future plans to include Persian and Turkish.
- **Bilingual search:** Users can search in either English or Arabic and retrieve the corresponding equivalent term.
- **Partial authority coverage:** Many terms may not have an equivalent in LCSH, FAST, or Wikipedia.
- **Semantic distinctions:** In cases where an English term has multiple meanings in Arabic, all relevant meanings are recorded, following the VIAF (Virtual International Authority File) model.
- **Exclusions:** The database does not include corporate bodies or personal names.
- **Cross-reference policy:** Cross-references are not provided at this stage.

- **Community contribution:** Users can suggest or modify terms through built-in participation features.
- **Technical infrastructure:** Reliable cloud storage will be selected and purchased to ensure secure hosting.
- **Software and processing tools:** A commercial platform will host the database. Python, a general-purpose programming language, will be used to deduplicate terms and merge supplementary files with the primary database.

The Arabic Thesaurus—Key Highlights

The following images provide a demonstration of the Arabic Thesaurus in action. They illustrate searching Arabic subject terms and retrieving their English equivalents (when available in LCSH), and viewing links from subject entries to LCSH, OCLC FAST, and Wikipedia to enhance research possibilities.

The Thesaurus address is http://multilangthesaurus.com. As shown in figure 1, a username and password are required to log in to the thesaurus.

When users log in, they are directed to the main searching page (see figure 2). This page is divided into two parts: part 1 is searching the thesaurus, and part 2 is for users to suggest a new term or modify or delete an existing term.
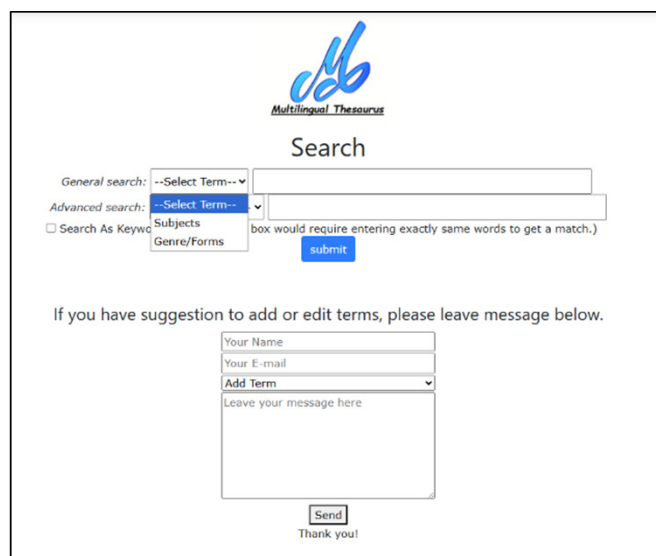
Users can search by the preferred term using the drop-down menu (figure 3). For example, users can search by either English or Arabic topical subject terms to find the equivalent. Users can search by

Figure 1. Log in page.

Figure 2. Main page.

Figure 3. Drop-down menu.

Figure 4. Searching the term "Caricatures and cartoons."

genre terms in Arabic or English to find the equivalent. All the subdivisions and the qualifiers of the topical subject headings are searchable from the same directory.

Figure 4 shows the searched term "Caricatures and cartoons" with Subject Directory selected in the drop-down menu. The search retrieved the English and Arabic equivalents of this term. It shows the first ten subjects. It also shows that there are eighty-one pages (810 terms) associated with this subject. Users can display all 810 terms if needed.
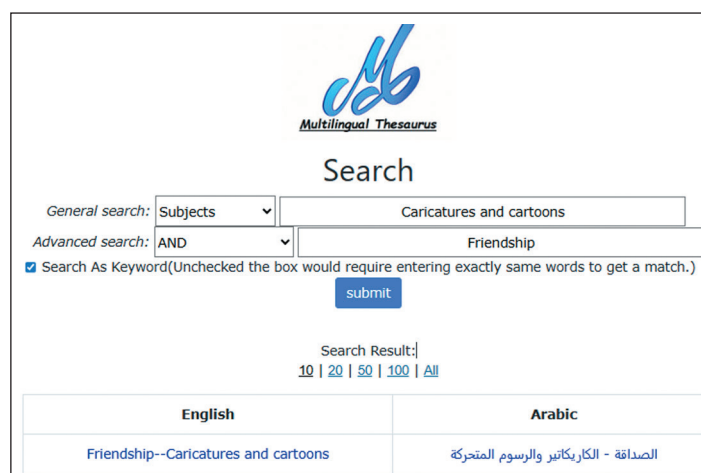
Because searching "Caricatures and cartoons" retrieved more than 810 hits, users can qualify the search by selecting one of the appropriate Boolean operators—and, or, not. In this search, the term "Caricatures and cartoons" was qualified by "and" the term "Friendship." As a result, the search retrieved only one hit (see figure 5).

Figure 5. Using qualifiers.

Boolean operators—and, or, and not—are available to construct searches. Searching using the Arabic term is the same as searching in English. Figure 6 shows searching for the Arabic term "سمك السلمون". Because this term will retrieve about 160 hits, the search was qualified by "and" and "النمو" and the equivalent in Arabic and English.
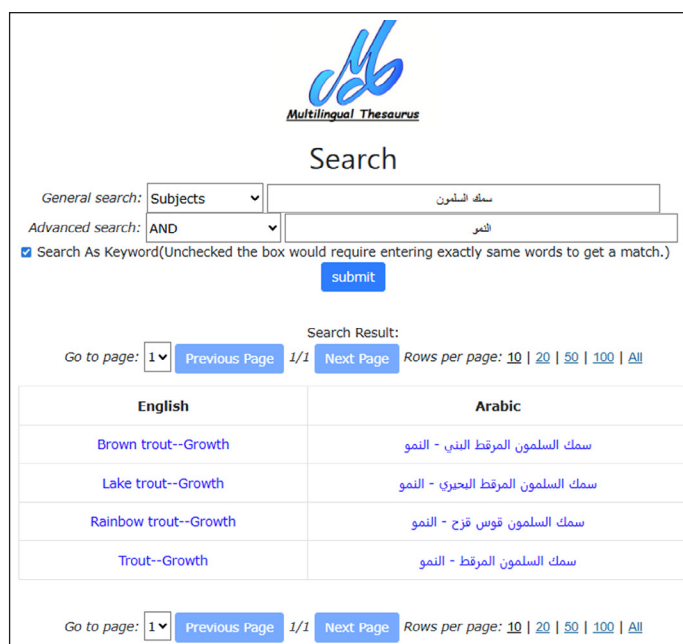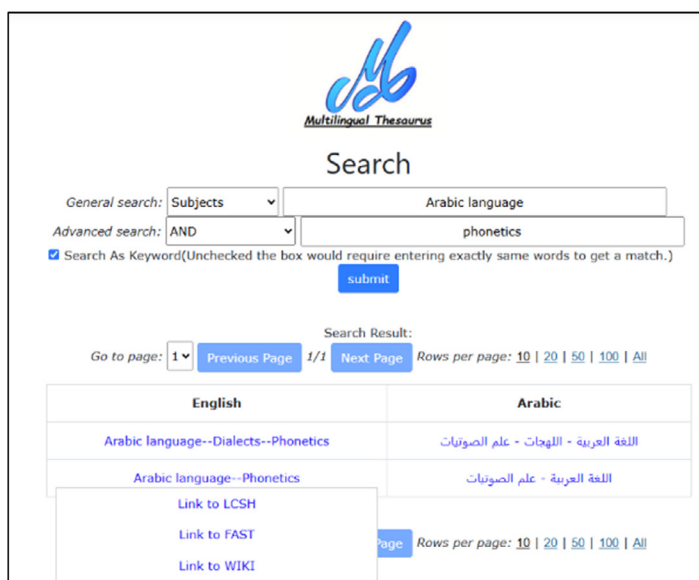
Figure 6. Searching the term in Arabic.

Figure 7. LCSH, FAST, and Wikipedia links.

Each term in English or Arabic is linked to LSCH, FAST, and Wikipedia articles when available. This feature provides the cataloger with more information about the usage of the term, as well as all cross-references. Wikipedia provides an article about the term that will enrich the user's knowledge about the subject, as well as providing the *see also with features*. The Wikipedia link can be added to the bibliographic record without having the cataloger search for it. To access the authority record, simply move the cursor above the terms and click on the link to LCSH, FAST, or Wikipedia (see figure 7).

Because this thesaurus is intended for Arabic cataloging and includes many terms created by the author, it will not have equivalents in LSCH or in the LC Authority file. Sometimes, records link only to Wikipedia or have no link at all.

Figure 8 shows the term "African Language— Grammar, Generative" that was created by the author and does not have a link to any authority file or Wikipedia. These terms are highlighted by two faded lines under the term. Figure 9 shows only the link to Wikipedia.

Searching the term "Education" in the by keyword directories results in 7,693 pages; each page displays ten hits for a total of 76,930 subjects. It provides any subject associated with the term "Education." This search facilitates browsing the entire database under a specific term (see figure 10). Using the "Go to Pages" icon, the user can select which page can be viewed. In this example, page 3 was selected for demonstration. Users can also display all 76,930 subjects.

The purpose of linking Arabic terms to LCSH and FAST is to give users access to the cross-references created by the LC and OCLC. This enables users to identify broader and narrower terms associated with a concept. Linking to a Wikipedia article is also valuable, because it allows users to learn more about the term, its definitions, and its usage. In many Wikipedia articles, the author includes "See" and

Figure 8. No link to LCSH, FAST, or Wikipedia.

Figure 9. Only the link to a Wikipedia article is shown.

"See also" references, which can serve as potential sources for creating new authority records and contributing them to the LC.

In the future, the link to Wikipedia could be embedded directly into the bibliographic record as an additional resource for users. Figure 11 shows the result of browsing OCLC FAST by the general keyword term "Agriculture." This search yielded 2,051 associated terms. When using this term in traditional cataloging, the cross-references "See" and "See also" are not carried over, nor are the LC Authority records, which include broader and narrower terminology related to the term "Agriculture" (see figure 12). When selecting the term from this thesaurus, however, the associated cross-references are included. Clicking on "Agriculture" displays these cross-references, which do not appear in the regular catalog.

Figure 10. Browsing by keyword.

Enabled URLs in figure 11 lead to the LC Authority file, which contains broader and narrower terms for each subject. For example, the DLC link (cataloging produced and input by the LC) for "Agriculture" contains broader and narrower terms (see figure 12) (https://id.loc.gov/authorities/subjects/sh85002415.html).

Figure 11. Links to cross-references and Wikipedia.

If the user would like to suggest the addition, modification, or removal of a term, they can send an email using the box shown in figure 13. This helps the community further enhance the usability of the thesaurus, making it truly international.

The Arabic subject thesaurus was created in response to a need that was articulated by ALCTS and will eventually cover all fields of knowledge. The user interface designed for this purpose allows users to search terms in Arabic and find links to English terms from LCSH, FAST, and Wikipedia. Arabic terms are drawn either from existing print thesauri or are created where no existing terms are available. The English-language user of the database will be able to search in English to find the matching terms in Arabic. An important feature of the database is its adaptability and flexibility. Users will be able to recommend additions or corrections to terms. As the database grows, it will become more comprehensive. The thesaurus will be available universally for the users of Arabic, English, and other languages.

Figure 12. Library of Congress Authority record.

Figure 13. Suggestions box.

Notes

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13. Magda El-Sherbini, "Improving Resource Discoverability for Language Collections," 2017, http://library.ifla.org/1982/1/S12-2016-el-sherbi-en.pdf.

14. Magda El-Sherbini, "Multilingual Subject Retrieval: Bibliotheca Alexandrina's Subject Authority File and Linked Subject Data." in *Data Science, Learning by Latent Structures, and Knowledge Discovery*, eds. B. Lausen, S. Krolak-Schwerdt, and M. Böhmer (Berlin: Springer, 2015), 535–46, https://doi.org/10.1007/978-3-662-44983-7_47.

15. El-Sherbini, "Improving Resource Discoverability for Language Collections."

16. El-Sherbini, "Improving Resource Discoverability for Language Collections."

17. El-Sherbini, "Multilingual Subject Retrieval."

18. 國家圖書館鏈結資源 = National Diet Library, https://data.gov.tw/en and https://data.gov.tw/en/datasets/27190

19. Ndlsh: governed by Japan National Diet Library and freely available (http://id.ndl.go.jp/auth/ndla).

20. Qāʼimat ruʼūs al-mawḍūʻāt al-ʻArabīyah al-qiyāsīyah lil-maktabāt wa-marākiz al-ʻulūmāt wa-qawāʻid—print thesaurus.

21. Sharing 국가서지:도서(서지), 온라인 자료, 기사 색인 및 주제명, 저자명, 그리고 도서관 정보 Linked Open Data 에 대한 탐색 서비스를 만나보세요!

22. Library of Congress Subject Headings.

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Voices from the Field
Library Acquisition Pathways for Indigenous Audiovisual Media

Kathia Ibacache and Arthur Aguilera

There is limited research on how academic libraries acquire Indigenous audiovisual media productions (IAMPs) from Latin American regions, and the representation of these materials is scarce in current vendor offerings. The purpose of this study is to understand how IAMPs are distributed from Latin American regions to universities in the United States. This study reports on interviews with thirteen individuals who work for production and distribution companies. The findings illustrate a distribution network that is difficult to navigate, characterized by complex licensing and underdeveloped relationships. The conclusion of this paper highlights the need for academic libraries to develop reciprocal collaborative partnerships with Indigenous creators and educational distributors to increase the representation of IAMPs in library collections and educational distributor product offerings.

Introduction

Audiovisual media productions under the creative control of Indigenous people from Latin American regions have flourished since the 1980s.[1] Through these audiovisual media productions, Indigenous people take control over their stories, challenging mainstream narratives that see them as subjects of study. However, there is limited research on how academic libraries acquire Indigenous audiovisual media productions (IAMPs) from Latin American regions, and the representation of these materials is scarce in current vendor offerings, compelling libraries to develop alternative acquisition pathways. This study explores IAMPs from a library acquisitions and academic distribution perspective, focusing on the opportunities and challenges associated with expanding acquisition pathways in the United States.

First, we conceptualize audiovisual media productions under the creative control of Indigenous people and survey the literature on acquisition practices for this media. Then, we examine findings from thirteen interviewees involved in the IAMP industry, including producers, *realizadores* (film directors), *colectivos* (Indigenous collaborators), and educational distributors. Our study concludes that gaps in the acquisition and distribution of IAMPs can be addressed by building reciprocal collaborative partnerships with Indigenous creators and educational distributors to increase the representation of IAMPs in library collections and educational distributor product offerings.

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Background

Conceptualizing Indigenous Audiovisual Media Productions

No audiovisual media production definition encapsulates all moving pictures under the creative control of Indigenous people from Latin America. Some scholars refer to Indigenous audiovisual works as Indigenous media, Indigenous videos, Indigenous films, or *cine indígena*.[2] In 2013, Houston Wood's analysis of Indigenous productions found it was "impossible to develop a single Indigenous perspective able to adequately engage with all the work in Indigenous filmmaking now being produced across the globe."[3] Yet, in 2014, Pamela Wilson et al. defined Indigenous media as "forms of media expression conceptualized, produced, and circulated by Indigenous people around the globe as vehicles for communication."[4]

In conversations with scholar Peter Baker, Kichwa directors Alberto Menuala and Frida Menuala rejected the term "Indigenous" to "distance themselves from the ethnographic label."[5] In 2024, Mixtec filmmaker Dinazar Urbina agreed that "Indigenous peoples are diverse" from "multiple territories and nations," and argued that the category of Indigenous cinema "causes the audience to distance itself from it."[6] Before this, in 2017, Mariana Lacunza referred to breaking free from the "romanticized and paternalist representations" of Indigenous persons, an observation Baker also reiterated.[7]

Purépecha director Dante Cerano highlighted the idea of creative control by differentiating between Indigenous audiovisual artists and *indigenist* films.[8] Citing Juan Bottaso, Francisco Gómez Tarin stated that the view of the *indigenist* supposes a narrative led by a dominant class, which acted as an intermediary for Native people, who, in turn, pushed back against representations created outside their cultural world.[9] He added that many ethnographic or anthropological documentaries reflected a "decontextualized" and external view of the Indigenous.[10] As a rebuttal, when Indigenous communities took control of their stories through audiovisual productions, they responded to years of ethnographic, documentary, and external representations.[11]

Our study builds on librarian Daisy Domínguez's 2004 paper, which defined Indigenous film and video as "produced by and/or under the creative control of native people."[12] Domínguez included films produced by non-Indigenous persons in this definition when these works presented "native peoples' perspectives."[13] In 2024, Javier Muñoz-Díaz, Kathia Ibacache, and Leila Gómez invited librarians to think about the prepositions "by/with" when building a film collection that is Indigenous and that incorporates works that represent collaborations between Indigenous and non-Indigenous partners.[14] Our study complements Domínguez's conceptualization following Amalia Córdova and Baker's notion (done in their 2005 and 2023 publications, respectively) that this media is multifarious in the "production methods, styles, and formats" it uses, the purposes it seeks, the audiences it targets, and the topics it covers.[15]

Acquisition Practices for Audiovisual Materials

Limited research exists on Indigenous audiovisual media acquisition practices from Latin American regions. Libraries have long purchased audiovisual media despite high costs and ever-evolving formats.[16] Current acquisition models require librarians to navigate a "hodgepodge of sources, pricing models, delivery platforms, licensing terms, and limitations."[17] In 2022, an Ithaka S+R study on streaming media acquisitions found that most respondents purchase physical formats and have increased their investments in streaming video subscriptions and single-title licenses, which are primarily sourced by only a handful of vendors, namely, Overdrive (Kanopy), Clarivate (Alexander Street), InfoBase (Films on Demand/Films Media Group), and Swank's Digital Campus.[18] For film and media, Librarian Debora Lee considered this barrier in her 2023 "Indigenous Studies Library Collection Development Toolkit," where she advised readers to consult publicity materials, film festivals, and library subject guides, and to directly engage with film producers to identify materials for this collection.[19]

Distribution of Indigenous Media Productions from Latin American Regions

Seeking to delineate the distribution and production's "international network" for Latin American films, Luisela Alvaray stated that distribution within Latin American regions occurred through television, media festivals, and the internet.[20] Other distribution networks for Indigenous media include transnational Indigenous film festivals, commercial big screens, and media-sharing sites such as Vimeo and YouTube.[21]

Citing Nicholas Garnham, Muñoz-Díaz, Ibacache, and Gómez emphasized that economies of scale favored distributors more than producers because producing an audiovisual work was more expensive than distributing it.[22] Muñoz-Díaz, Ibacache, and Gómez added that financial power and market control based on a few vendors and buyers built an unequal relationship among the audiovisual industry's stakeholders.[23] For these authors, independent platforms struggled financially in this global environment but could progress through a more reciprocal relationship based on fair payment and the diffusion of marginal content.[24]

In these circumstances, Indigenous communities often must set up "horizontal distribution networks" rooted in "reciprocity and mutual obligations" that result in free screenings for Indigenous communities and limited distribution to academic institutions that view the knowledge and culture as "fungible."[25] Discussing Latin American and Spanish online videos, Jesús Alonso-Regalado concludes that communication between libraries and video vendors and developing a "mutual understanding" are crucial to bringing online videos to academic libraries.[26]

Methodology

This research, approved by the University of Colorado Boulder Institutional Review Board (IRB), encompasses thirteen semistructured interviews conducted on Zoom between October 2023 and

November 2024, with an average duration of sixty minutes per interview. The authors emailed invitations and consent forms to each participant (Appendix A). At the end of the interview, the participants received a copy of the Zoom recording and transcript. Interviews were conducted in English and Spanish.

The authors manually transcribed each audio recording to fix errors in the Zoom-produced transcripts. Ibacache transcribed audio recordings in Spanish and then translated them to English. Our thematic analysis adapted coding procedures developed by Clarke and Braun.[27] Individually, we coded the transcripts with observations related to our research examination. Then, in conjunction, we compared our codes, integrated them, and grouped them into themes that best captured the responses (table 1).

Table 1. Themes Derived from Interviewees

Theme	Description	Quotes
The heterogeneous nature of Indigenous Audiovisual Media Productions resists Western-induced labels	There is no universal definition for "Indigenous cinema." The definition of Indigenous cinema depends on the context in which it is developed, the level of creative control and participation of Indigenous people, and local considerations.	*"No, indigenous cinema seems perfect to me. It is not just a community cinema and it is not an indigenous cinema either. Indigenista is the outside vision of the indigenous world or of cinema. There are many filmmakers who make films about the indigenous world, it is indigenous cinema. It can be anthropological, ethnographic, it can be of any type, but it is not its own indigenous cinema. It is a cinema that comes from an external production"* - CEFREC *"It is sometimes confused with community cinema. Community cinema is not the same as indigenous cinema. I say this because there is great confusion. Sometimes you think that everything is the same; It is not the same. Community cinema, indigenous cinema has a lot of community cinema, but community cinema is any expression of any group that is organized to make cinema. It can be a neighborhood, it can be a school, it can be a group of women, of young people. It can be in the urban area, in the rural area, that is community cinema, which is made together, which is made collectively, but it is not the same as indigenous cinema."* - CEFREC *"That is a discussion, but in reality indigenous cinema is the cinema of indigenous communities. Many will consider Sanjinez cinema as indigenous cinema, it is not bad either because there is a direct participation of indigenous communities. If we were too strict we would say no, but in a broad sense, we would say yes."* - CEFREC *"Retablo is not an indigenous cinema, it is a cinema whose script is designed to be made in another context, but to access the development fund it has been adapted to the Quechua world."* - CEFREC *"We have discussed a lot with other fellow filmmakers; many say indigenous cinema, village cinema, and Kichwa cinema are also talked about a lot. For me, cinema must have an identity. If it does not have that identity it would be a cinema made by indigenous people, basically, or by a Kichwa, or by someone from an indigenous people."* - Realizador 1 *"When [Maria Sojob] was in contact with the Berlin Film Festival, they would select it but only in the category 'Indigenous cinema'. So, she did not accept it because it is not what she wanted."* - Terra Nostra *"The indigenous vision is not the same as what the West has or the Western view. And that has to do with the realities that communities experience."* - CEFREC

Theme	Description	Quotes
		"When we talk about indigenous cinema, we generalize things; ah! It is made by indigenous people! So, that is an indigenous cinema, it is not true. I said that for me, cinema [goes] much beyond that generalization. Cinema must have nuances, it must have narratives, it must have its own searches that can be said to be an indigenous cinema, a cinema of an indigenous people, a Kichwa cinema. As long as that doesn't happen, it is a cinema made by indigenous people, for me." - MULLU *"Alberto Munala, indigenous filmmaker, the first Ecuadorian filmmaker. He puts his films in universities, his script is very traditional, it is a drama, its entire structure, its editing is very traditional for Western cinema. Basically it is a cinema made by an indigenous person, but it is not a cinema that has an identity."* - MULLU
Film training for indigenous creators provides an essential pipeline	There is limited availability of formal film training for Indigenous creators. Film schools that recruit and train Indigenous creators may be vendors libraries can tap into.	*"In all of them, and including the training that is not here. Our work is comprehensive. We strengthen the processes of self-expression, of idea generation, which are generally ideas that come from organizations and communities. For this idea to develop, we do training, we train indigenous filmmakers to develop the proposals that come from the communities."* - CEFREC *"When I started in film, we were trained from the perspective of development to post-production and that was it. In other words, we were never told what came next. This was quite complex, because in fact now that I have had the opportunity to walk several [paths] here in the industry, so to speak, I have understood many things that I didn't know before, that it was called that, but that we empirically did it in my country. What is the point? For example, when we finished shooting before in the first films, for example, we said, and now what? What do we do? Who do we show it to?"* - Realizador 1 *"Many of these people already know how to make films, and sometimes they are looking for collaborations. But, I prioritize having local people on my team to develop their skills since our films become our film schools"* - Terra Nostra *"The film school has not only been designed to provide workshops, which have historically been given within the native communities but also as a sustained, long-term process. In the end, we have a fairly important objective, very macro, but not unattainable. Have the first film school for indigenous and Afro peoples in Ecuador. And that it is universally accessible to our populations."* - MULLU
Indigenous audiovisual media productions span diverse formats, purposes, topics, and genres	Indigenous audiovisual media productions are not a genre in themselves. They manifest in many formats and genres.	*"It is not a genre, it is not another genre of cinema, but it is different from conventional cinema. It responds to other types of collective, community processes, which have other types of purposes."* - CEFREC *"It has many tints, many nuances."* - MULLU
IAMP is more than an Indigenous language in a film	Indigenous Languages respond to cultural heritage construction.	*"It's a difficult question. The Ukamau cinema has been a cinema very close to indigenous communities. There is a book called "Theory and practice of a cinema next to the people." It is a cinema that has had a very direct participation of indigenous communities, it has worked very closely with the indigenous communities, but the director Jorge is Sanjinez, he is not indigenous."* - CEFREC *"...making a film in indigenous languages is not the same as promoting cinema indigenous."* - CEFREC

Theme	Description	Quotes
		"Because cinematographic creation has very strict rules that come from the Western European tradition where literacy is main. So, that is why collective processes of gionization are carried out, collective production processes where there are not necessarily directors. For example, here in Bolivia there are no indigenous film directors. It is not an individual vision, it is a collective vision. So, in that sense, the skills that already come are developed (because there are skills for music, dance, for artistic expression, for painting)." - CEFREC *"Language is important in our work […], which is a process of constructing narratives, and language itself is an element of people's communication."* - MULLU
Indigenous audiovisual media productions have diverse audiences	There is a strong interest in IAMP reaching a broad audience. Academic audiences are identified as key targeted groups.	*"As filmmakers, we try to make it as wide as possible, the audience of the films. But there is this situation here in Brazil where most of the Brazilian films only have an open door here after they premiere in a country with a special festival."* - Encuadramento *"Yeah, we have 2 different audience. and the more, and both are very important the 1st one is the all the communities, or all the people that are in the avalanches all the indigenous people. and also the other audience is all the public in general."* - 68 voces *"It depends on the story. All this production is done for two audiences, for the indigenous public first, but also for the urban public"* - CEFREC *"I am very interested in young audiences. Because I feel that the new generations, that is, we as young people are losing a lot of our ancestry."* - Realizador 1 *"Our audience is mainly global audiences that are interested in Indigenous peoples and environmental justice so its quite wide. Our intention is that young people can reach the knowledge and stories of a world that seems to have vanished and hasn't. It's there and can deliver great clues for the crisis we are facing and the challenges we are having as a global community nowadays."* - KaboPro Films
Indigenous creators participate in all stages of the film creation process	Indigenous peoples may be involved in all stages of the film creation process, from initial conception through distribution.	Roles include: writer, researchers, storytellers, producers, editor, crew, cinematography, actors, director, feedback on script, reporter, translator, and photographer
Collaborative partnerships generate mutual benefits	Cultivating respectful and reciprocal partnerships between distributors, media creators, and academic institutions is a key goal.	*"…meet the the people there, talk with the elders. and know from them which story they want to share, which story is important for them. So most more people can know about their community, their culture, their language."* - KaboPro Films *"In our latest production, this is a word that is very clear to me, its called 'Ayni' in Kwicha. 'Anyi' means reciprocity. I work with you, your work with me, we respect each other. You give me something, I give you something, we share. This is the ethos."* - KaboPro Films *"I find the distributor in New York interesting because they work on topics that interest us, topics related to education, topics related to history, identity, combating machismo. If an agreement is made, let there be space for contact, talk about motivations and different perceptions of the world, worldviews."* - CEFREC

Theme	Description	Quotes
		"The Javeriana University provided us with technical knowledge like how to handle cameras and the use of microphones, and editing." - Pastás audiovisuals / AKMUEL
		"With Terra Nostra, I have a co-production; We own two of my films, Mama and De Aspecto Indigena. We are 50% co-owners. Terra Nostra owns 50%, and I own 50%. So, we decide together what the distribution routes are. As a production house, they [Terra Nostra] have more knowledge of universities or are in contact with other countries. In my case, I focus on the topic of festivals. It is a joint effort because Terra Notra does all the subscriptions?" - Realizador 2
		"I always try to work in very close relationships with my partners. Listening to them, giving them my experiences and I"m trying to figure out what would work for this specific title." - Encuadramento
		"In the case of what has been distributed to universities in the United States, that money has made it possible to hire a person who is in constant contact with universities. This person speaks English and handles the mail. So, the money that comes in from the universities that pay, we use to pay the salaries of other collaborators." - Terra Nostra
		"In postproduction and distribution, we tend to do it by ourselves but we also work together with the communities when we finish the movies, we try to give back the material to them in many aspects." - KaboPro Films
		"And then we made projections back in their own villages. That was really important for us. To show the film to the whole tribe that were involved in the process." - Encuadramento
		"When we are involved in the beginning of the documentary project, we offer to share the rights of the movies with the author, 50/50. When we sell to the universities in this case a movie, after we shared the rights 50/50 with the authors. So the author is always a co-producer, always." - Terra Nostra
IAMPs have diverse distribution pathways	IAMP strives to enter established distribution pathways such as film festivals and reach out to commercial distributors, but often has to rely on self-distribution methods.	*"It's very important for us to not only send our movies to indigenous film festivals. If we do this, we are feeding all this tendency that indigenous filmmakers can only show their work in indigenous film festivals. It becomes like a ghetto."* - Terra Nostra
Distribution to universities in the United States is challenging	Due to various obstacles, Indigenous creators from Latin America have difficulty reaching the academic market in the United States.	*"The market in the US is more difficult for non-English films to enter, you know? Even if we premiered in Sundance or premiere in the big festivals in the US, even then, it's difficult for us to get distribution in the US. Its much easier to get distribution in Europe."* - Encuadramento
		"For example, I would never know how to offer a film myself to your university. It's not easy for me to find you and to figure out how to offer it to you. And with each university, the idea of contacting each of them is crazy for us". - Encuadramento
		"...educational spaces gives value to [our] work. This helps to eradicate the false idea that we are stupid and don't know how to do things well." - Realizador 2

Theme	Description	Quotes
		"And I get in touch with them but then again as my films are more author-driven instead of commercial-driven, they are not always interested." - Encuadramento
		"Amazon, Netflix, Hulu, HBO, they are not focused on the academic world." - Digitalia Films
		"We work with Indigenous filmmakers less than we'd like to, but we do in the exchange of emails. We are always searching for films made by indigenous peoples and we work with filmmakers. Not so much with communities, but filmmakers." - Pragda
		"The, I think, for indigenous filmmakers is to find us. Or us finding them." - Pragda
		"Sometimes librarians wrote us asking us for the movie for their library, and we don't know what to say. They would say you need to send a DVD, and for us, it was complicated because to send a DVD from Mexico we have to make a partnership with an organization in the United States, and we don't have this. Now we know that its not necessary to send a DVD, that thanks to people we've met and the information we've received, it's possible to propose the digital site licenses to universities so they can have the file, and then organize a screening." - Terra Nostra
Distribution wishes and challenges for IAMP creators	Creators want their films to be watched, discussed, and to help enact change. They face challenges distributing their works due to a lack of connection with distribution partners.	*"It is important for Indigenous peoples to inhabit spaces that historically have not been inhabited by us."* - MULLU
		"One of the big problems with streaming platforms is that they think they reach everyone, but in reality, they do not because the Internet does not exist everywhere. Not everywhere there is the desire to subscribe to these platforms. Or simply, the bandwidth is not enough. But of course, for the rest of the world with that infrastructure, it will be possible for those people to see the movie. I am split in half; on the one hand, I wanted to because it would also save me some of the emotional and physical work of promoting the film. But, on the other hand, I feel that these films I make are essential for contexts where the internet does not exist or streaming does not exist. You have to carry those films on foot or in vans. Those are the two situations. But I do want to. I would like to find a [streaming platform] that [gives] me this freedom." - Realizador 2
		"It has been quite a challenge for First Nation people to think about distribution, what this issue is like, and how we can reach other spaces with our films." - Realizador 2
		"And that they can have this. They they give like a good use to the.: to the material. I have very clear that all these stories are a tool, and also we wanted that this tool could be use wisely to : help to make more efforts to revitalize, learn, wash to know more about the cultures." - 68 voces
		"The issue of distribution rights, that there be clarity without taking away the autonomy of who owns the film. On the other hand, the countries where the film can be distributed, if there is an interest in the territory that has similarities with these stories that can cause an interest in co-productions, in alliances." - Pastás audiovisuals / AKMUEL
		"...there are rules under which an audiovisual production must be respectful of the communities, respectful with the life itself. This are the agreements that we can have with respect for this type of production: credit the communities, the collaborative work, the co-production that we can make with the universities." - Pastás audiovisuals / AKMUEL

Theme	Description	Quotes
		"Films made by people from First Nations are important in spaces of political influence, such as festivals and universities. There is a belief that we indigenous or native peoples do not know how to do things well. So, the fact that our films reach festivals, universities, and educational spaces gives value to that work. This helps to eradicate the false idea that we are stupid and don't know how to do things well." - Realizador 2 *"Academia has experienced this a lot. There are many anthropological studies about the different peoples of the world, but those studies are written by people who do not belong to those people. In recent years, there has been a greater presence of colleagues from indigenous peoples or people of African descent who are writing their own stories."* - Realizador 2
Distribution wishes and challenges for producers	Producers want to establish relationships with academic institutions and libraries, but are unsure of the best ways to get in contact.	*"We would want to know better on how librarians and universities make their choice to decide to get some movies and the criteria used by librarians to choose these kind of movies."* - Terrra Nostra *"For me, it would be more interesting to each constantly try to reach the educational distribution in the US than to make a sale to Netflix. It doesn't look quite obvious, but it's true."* - Encuadramento *"We are producing the films because we want them to be discussed. We want to tell a story that resonates and people debate about it."* - Encuadramento *"And it's important for us to make these stories travel because it's their own point of view of the story. That's why it's important. It's not a western point of view of their lives. It's themselves telling their stories."* - Encuadramento *"The problem in some countries for instance, Chile, but not only, you contact a big famous festival in Chile for instance, and if you propose to them a film made by indigenous filmmaker, they will automatically send it to the category 'Indigenous cinema'. They will send it instead of selecting it with the other movies of the world, they will send it to a ghetto category. I'm calling this a ghetto category."* - Terra Nostra
Distribution wishes and challenges for educational distributors	Distributors want to distribute IAMPs as part of efforts to build a diverse catalog for customers. Communication and technical challenges hinder this work.	*"It's not ideal for us because obviously we prefer to have as many titles as possible so we prefer to establish agreements with vendors that have an interesting catalog. Sometimes we have to go title by title."* - Digitalia *"Not really. Our audience, our clients, are universities and colleges. And second, public libraries. But mostly universities and colleges. And that's how we select films and documentaries that may be of interest to latin american studies, to film studies, or social studies, etc. That's our audience. Thai is for faculty, for researchers, and students."* - Digitialia *"We are an educational distributor, so our audience is mainly Latin American studies departments, departments that study indigenous peoples."* - Pragda *"The most important thing would be, or is, to include invisible voices in the mainstream of their daily lives or their daily work. Meaning, they work with certain films, usually well-known filmmakers, they have lots of academy awards, and they use documentaries that have been produced by celebrities. It would be wonderful to include content that is equally well done even if the filmmaker is not known. And include that content from minorities in the bigger picture".* - Pragda

Theme	Description	Quotes
		"But we work also with filmmaker sand producers that are truly indpedent. And they don't know so much the ins and outs. So we talk to them, we explain to them what we are going to do with the film." - Pragda *"We have found also in some instances that we have had to say no to some films by indigenous peoples because the pace is so so so so so slow that it would be very hard for us to even sell to a department." - Pragda* *"For indigenous peoples, to process those payments. It's a pain in the ass. Because sometimes they don't have bank accounts. Sometimes its' a friend whose processing payments" - Pragda*

Table 2 lists the organizations that participated in the interview. Table 3 lists all the Indigenous people, languages, and geographic regions mentioned in this study.

Table 2. Organizations and Individuals Who Participated in the Interview

Organization	Geographic Region	Stakeholder Role	Film Training for Indigenous
68 Voces 68 Corazones	Mexico	Non-profit production (Ally)	
The Cinematography Education and Production Center (CEFREC)	Bolivia	Production company (Ally)	X
Digitalia Films	Latin America North America Canada United Kingdom Spain	Educational Distribution	
Realizador 1	Guatemala	Maya Poqomchi realizador, Production	X
Realizador 2	Mexico	Maya Tsotsil realizador	X
Realizador 3	Peru	Indigenous realizador, production, distribution	
KaboPro Films	Chile Bolivia Argentina Mexico Africa	Filmmaker, Production (Ally)	
Catitu Institute	Brazilian Amazon	Non-Governmental Organization (NGO)	X
Pastás audiovisuals / AKMUEL	Colombia	*Colectivos of Indigenous Communication*	
Encuadramento	Brazil	Production company (Ally)	
MULLU	Ecuador, Brazil	*Colectivo of Indigenous realizadores*	X
Pragda	Spain, United States	Educational distribution	
Terra Nostra	Mexico	Production company (Ally)	X

Table 3. List of Indigenous Peoples Mentioned in the Interviews and Their Geographic and Linguistic Attributes

Indigenous People	Language(s)	Geographic Region
Garifuna	Arawakan	Caribbean (Honduras, Belize, Guatemala, and Nicaragua)
Guarani	Guarani	Argentina, Brazil, Paraguay, and Bolivia
Kaqchikel (Maya)	Kaqchikel	Guatemala
Los Pastos	Barbacoan language (vestiges of an extinct language)	Colombia, northern Ecuador
Maasai	Maa	Kenya and northern Tanzania
Mapuche	Mapudungun	Chile, Argentina
Mentawai	Mentawai	Mentawai Islands, including Siberut
Muisca (Chibcha)	Chibcha	Colombia
Paéz, or Nasa	Páez	Cauca, Colombia
Poqomchi' Maya	Poqomchí, K'eqchi'	Guatemala
Ticuna (Tukuna, Maguta, or Tikuna)	Ticuna, Tikuna, Tucuna or Tukuna	Amazon Basin
Toba (Qom)	Toba Qom	Argentina
Tsotsil (Tzotsil) (Maya)	Tsotsil (Tzotsil) (Maya)	Mexico
Tseltales (Tzeltal) (Maya)	Tseltales (Tzeltal) (Maya)	Mexico
Wayuu	Arawakan (Wayuu)	Venezuela, Colombia
Wixárika	Huichol	Mexico
Xingu	Tupi-Guaraní, Arawakan, and Caribbean families, as well as some language isolates	Xingu Indigenous Park, Brazil
Zapatec	Zapotec	Mexico
Quechua	Quechua (in Ecuador, Kichwa) family languages	Andes Mountains, particularly in Peru, Ecuador, and Bolivia.

Participant Demographics

The participants represent a small sample of creators, producers, and distributors involved in IAMPs from Latin America or educational distribution (table 2). We organize the interviewees into stakeholder groups using terminology provided by the interviewees. *Realizadores* represent filmmakers or directors who work independently or with a production company. We also used the word *colectivo* to denote community and collaborative representation in audiovisual works' creation and decision-making processes. Although sometimes the participants' work crosses over to fulfill broader responsibilities, for example, a producer could also be the *realizador*, for the purpose of this study, we considered them as they identified themselves during the interview. Finally, we referred to educational distributors to describe organizations that target university libraries with their products.

The interviewees had a variety of expertise and work experiences across different geographical regions in Europe and the Americas (table 2). Five interviewees identified themselves as part of production

companies. The *realizadores* (three interviewees) performed production work. Two participants were members of *colectivos*, and one respondent identified as a non-governmental organization (NGO), focusing on creating and promoting productions by Indigenous women from Brazilian territories. Two participants were representatives from educational distributors actively working with academic libraries in the United States.

Limitations

Our study has two limitations. First, finding participants involved in creating and distributing IAMPs was challenging. To address this issue, we relied on contacts from whom we had previously purchased film licenses. We also searched the internet, social media, and related film festival catalogs to gather the names of additional participants and consulted with film scholars for potential contacts. One scholar refused to provide contact information directly, alluding to privacy considerations. Ultimately, we invited fifty-one people to interview.

Second, the first five interviews were conducted in English as initially planned. However, we decided to revise our research design to allow interviews in Spanish because one of the principal investigators was a native Spanish speaker. After we received approval from our institution's IRB, the remaining eight interviews were conducted in Spanish.

Findings

The Heterogeneous Nature of Indigenous Audiovisual Media Productions

> "The indigenous vision is not the same as the West has or the Western view. And that has to do with the realities that communities experience. Sometimes you think everything is the same; it is not the same."—*El Centro de Formación y Realización Cinematográfica (CEFREC)*

There was no consensus on what terminology best reflected IAMPs, because these works represent various productions, persons, and communities. Some terminology refers to cinema from a geographic region, such as Quechua cinema. The *realizador* from the *colectivo* MULLU noted that he never used the term "Indigenous" in the interview, to avoid a term used to stigmatize communities. MULLU also stated that cinema should have an identity based on topic and aesthetic but should not be the only factor when categorizing this media.[28]

Terra Nostra expressed similar sentiments, referring to the "Indigenous" label as a discriminatory term that feels like "a ghetto." Distributors used terms such as Indigenous cinema to capture all media about and by Indigenous people. Creators differentiated between cinema made by an Indigenous community and cinema created by an individual who belonged to a community. Some of the interviewees feared that the labeling of "Indigenous cinema" could lead to an idealistic romantic view of their identities and cultures. CEFREC noted: "Cinema created without Indigenous participation is not Indigenous cinema,

highlighting the need for Indigenous creators to be represented in the film creation process to be considered 'indigenous.'"

Film Training for Indigenous Creators Provides an Essential Pipeline

One feature that set some participants apart was their involvement in providing film training to Indigenous people via workshops and informal school settings. Seven of the thirteen interviewees provided education and skills development for Indigenous communities via a film school (table 2). The interviewees considered film schools a crucial source of training and film creation development for Indigenous people, especially when formal training was scarce in some locations. The Maya stotsil *realizador* noted that it was important to "enhance skills because Chiapas did not have a film school."

Some interviewees noted a symbiotic relationship with a film school, or they had a subsidiary providing training and development for Indigenous filmmakers. In this combined setting, the film school was free to students, and the productions were cocreated with a production company. The production company then sold the films to generate profits and reinvested some of the proceeds into the film school. The work of the producer/*colectivo 68 Voces* exemplified a symbiotic relationship when alluding to the role of community elders in selecting important stories they shared. *68 Voces* also involved children from the community through workshops, in which the kids communicated stories through drawings, which inspired future productions. Referring to film, the *realizador* from the *colectivo* MULLU stated that "it was important for Indigenous people to inhabit spaces that historically have not been inhabited by us."

The interviewees also acknowledge the relevance of training beyond the film schools. A pivotal point gathered in the interviews was that some interviewees knew little about the academic market in the United States and felt it relevant to receive training on licensing, distribution rights, and other postproduction matters.

Indigenous Audiovisual Media Productions Span Diverse Formats, Purposes, Topics, and Genres

> "It is not another cinema genre, but it is different from conventional cinema. It responds to other types of collective, community processes, which have other types of purposes."—*CEFREC*

IAMPs span all formats, including feature films, documentaries, docufiction, short films, and television programs. When referring to the purpose of their work, the interviewees shared common purposes for creating their audiovisual works. Multiple interviewees mentioned the political and social activism nature of their productions, whereas others used this medium to push back against racist stereotypes and cultural assimilation.

Some interviewees noted that these audiovisual works made Indigenous stories visible and raised consciousness for critical topics, such as saving sacred land, supporting judicial proceedings,

safekeeping community memory, strengthening the roots of identity, and raising awareness of Indigenous knowledge. Yet, thematic advocacy was not the only purpose; some interviewees wished to demonstrate that Indigenous film creators could generate quality works of fiction and nonfiction and discuss them in an educational setting. The interviewees also indicated that *cosmovisión* was very relevant to them.[29] Regarding genres, one *colectivo* noted that their audiovisual works represent different aesthetics and genres, including magical realism, comedy, romance, drama, and horror.

IAMPs Are More Than an Indigenous Language in a Film

The interviewees referred to various languages, from Indigenous languages spoken in the South of Chile and Central America to those in the Caribbean and North America. A representative from CEFREC noted a compelling point regarding the use of Indigenous languages in films: "Making a film in indigenous languages is not the same as promoting Indigenous cinema." He was alluding to films made without Indigenous intellectual contributions but that added an Indigenous language to access government funds meant to promote IAMPs.

Our findings on language also highlighted contrasts between the dominant society's spellings and those that Indigenous people accepted. Referring to the views of a stotsil *realizador*, Terra Nostra shared that stotsil was written with an "s" and not with a "z," noting that changing the "s" to a "z" was an alteration (Tzotzil) that anthropologists had created. The *realizador* from the *colectivo* MULLU stated, "Language is important in our work […], which is a process of constructing narratives, and language itself is an element of people's communication."

Indigenous Audiovisual Media Productions for Diverse Audiences

The producers, *realizadores*, NGOs, and *colectivos* listed general and specific audiences as their primary viewers, but it was the educational distributors who specifically targeted higher-education audiences (i.e., faculty, students, researchers, libraries), as well as academic departments specializing in particular subject areas, such as Anthropology, Latin American Studies, and Indigenous/Native American Studies. *Realizadores* were interested in reaching as broad an audience as possible, observing that it was important that their films went beyond their territories, extending to global audiences that could make an impact through their work. The producer Enquadramento affirmed that "it's important for us to make these stories travel because it's their point of view of the story. That's why it's important. It's not a Western point of view of their lives. It's themselves telling their stories."

Multiple interviewees noted young people and students as their primary audience, especially higher-education students. The filmmaking and production company KaboPro Films stated: "Our intention is that young people can reach the knowledge and stories of a world that seems to have vanished and hasn't." Interviewees also noted the importance of reaching broad audiences to combat the romanticization of Indigenous people and topics.[30] For example, Enquadramento stated: "We think that, not always for good reasons, indigenous projects are always very attractive for foreign audiences. Sometimes because they have this vision that's more romantic or something like that."

Indigenous Creators Participate in All Stages of the Film Creation Process

Apart from the educational distribution companies, all the interviewees engaged with Indigenous people in making and producing audiovisual works, but Indigenous participation varied throughout the stages of the film creation. Indigenous people participated in development and the preproduction and production phases, and others participated in all the stages. Some Indigenous people were involved in the idea formation of a film, screenwriting and storytelling, research, filming, and providing input on the soundtrack. Others were involved in the film's editing, final cuts, and production, or as crew members, cinematographers, actors, directors, reporters, photographers, and translators. Each film process was an opportunity to provide educational experiences where Indigenous creators received film training.

Collaborative Partnerships Generate Mutual Benefits

The NGOs, producers, and *colectivos* indicated a strong commitment to cocreation with Indigenous filmmakers, which they saw as equitable and fair. These collaborations relied on input from Indigenous and non-Indigenous creators (by/with). The most essential elements of these cocreations comprised validating Indigenous people's point of view and stories, making decisions about the production and distribution of the work cooperatively, and securing equal ownership and sharing of profit. The producer KaboPro Films noted: "We respect, we don't steal images and stories. We work together; it's part of our ethos. We learn that with them."

Similarly, some interviewees noted their interest in relationships built on the values of reciprocity (*Ayni*).[31] KaboPro Films declared: "In our latest production, this is a word that is very clear to me, it's called '*Ayni*' in Kwicha. '*Ayni*' means reciprocity. I work with you, you work with me, we respect each other. You give me something, I give you something; we share. This is the ethos."

The producer Enquadramento raised the issue of representation to highlight that communities represented in a film must approve such representation: "It doesn't make sense to us, at least, to have a film where we arrive like aliens in this region and say, "No, you should do this, and that, and that's it.' No, it doesn't make sense. We need to collaborate, so that's it. The representation that we make should make sense to them, not only to us."

Collaboration also expanded to include conversations with Indigenous communities and research organizations. Collaborative partnerships were present in different stages of film creation and distribution. *Realizadores* advocated for collaborative processes that gave them equal input on the script and autonomy over their knowledge. There was special interest in the postproduction and distribution phases, where it was important for IAMP creators to voice how their media was distributed, including advocating for spaces that provided open and free access to their work, independent of the licensing contract.

Correspondingly, some producers added that these collaborative partnerships necessitated managing expectations. The producers noted the importance of building long-term relationships by being

transparent about how the film would be created and funded, and how profits would be distributed. Regarding academic spaces, the interviewees considered the value of collaboration in generating discussion and reflection beyond politically constructed representation and educational theories and concepts.

Diverse Distribution Pathways

Interviewees distributed their works through multiple avenues. Some respondents sold digital files and hosted university, school, and museum screenings. Others tried to reach nonprofit or government agencies. Two interviewees were able to negotiate having their content broadcast on television. Self-distribution practices included posting the film online on free video-sharing sites like Vimeo and YouTube. The interviewees also noted that distribution improved due to the advances and accessibility of filming technology (cell phones). These digital technological advancements facilitated the transition from physical (DVDs) to digital (streaming) formats, favorably contributing to the distribution process.

Of all the distribution pathways, the interviewees agreed film festivals were crucial for distributing audiovisual works because they created exposure for Indigenous works, leading to higher discovery, financial prizes, and a connection to the educational market. However, there were barriers to the festival pathway. One prominent barrier was the feeling of being boxed into the Indigenous film categories (referring to the "ghetto category"). Recalling the experience of a stotsil filmmaker with the Berlin Film Festival, Terra Nostra indicated that this *realizador* refused to present her movie if the only category available for it was under "Indigenous Cinema." Other barriers were meeting audience expectations and having mixed feelings regarding the importance of Indigenous-focused film festivals.

Distribution to Universities in the United States Is Challenging

Across the board, the interviewees expressed a strong desire to have their works distributed and discussed in educational settings in the United States. The interviewees believed higher education supported collective reflections and advocacy around audiovisual works that functioned as tools to bring societies, cultures, and nations closer together.

The *realizador* from the *colectivo* MULLU suggested that generating debate based on their work was essential to develop conversation in academic studies. Several interviewees perceive the United States to be an influential country. They mentioned that reaching academic audiences provided an opportunity to fight back against folkloric and romantic stereotypes assigned to Indigenous people. The stotsil *realizador* observed: "Educational spaces give value to [our] work. This helps to eradicate the false narrative that we are stupid and don't know how to do things well."

In this sense, IAMP creators and producers viewed their works as knowledge-sharing and advocacy tools, but there were difficulties. The producer Enquadramento commented: "We are producing the films because we want them to be discussed. We want to tell a resonant story, and people debate it." However, they noted, "the market in the US is more difficult for non-English films to enter." Enquadramento continues: "For example, I would never know how to offer a film to your university. It's

not easy for me to find you and figure out how to offer it. And with each university, contacting each of them is crazy for us."

Some participants entered into direct agreements with universities and distributors. *Realizadores* and production companies have reached educational institutions through invited film screenings and exhibitions. Selling digital licenses to universities was less common, but there was much interest in this acquisition method because physical formats were sometimes difficult to produce.

> "Sometimes librarians write to us asking us for the movie for their library, and we don't know what to say. They would say you need to send a DVD, and for us, it was complicated because to send a DVD from Mexico, we have to make a partnership with an organization in the United States, and we don't have this. Now we know that it is not necessary to send a DVD, that thanks to people we've met and the information we've received, it's possible to propose the digital site licenses to universities so they can have the file and then organize a screening."—*Terra Nostra*

Distribution Wishes and Challenges for IAMP Creators

Film creators largely wish to build relationships with distributors and their audiences, but they also seek for their work to be contextualized, valued, and distributed beyond their physical borders. Agency over their stories is vital for the *realizadores*, *colectivos*, and producers, forming collaborations for new productions and knowledge transmission. However, participants also referred to difficulties.

Some interviewees noted the disadvantages of films staying in their own country and difficulties communicating with distributors, affecting opportunities to reach the academic market. The producer Enquadramento declared, "As filmmakers, we try to make the audience of the films as wide as possible. But there is this situation here in Brazil where most Brazilian films only have an open door [in Brazil], after they premiere in a country with a special festival." Other challenges relate to payment and language barriers during the negotiation phase, and the opportunities educational distributors miss out on by not attending film festivals to learn about new audiovisual works that may be relevant to academic audiences.

Participants also referred to restrictive license arrangements and the loss of creative control. Regarding higher education, film creators noted that they were unsure how to distribute films to academic spaces or find distributors who worked with educational institutions. The *realizador* from the *colectivo* MULLU stated: "It has been quite a challenge for Indigenous people to think about distribution, what this issue is like, and how we can reach other spaces with our films." Due to these challenges, all the *colectivos* and *realizadores* rely on self-distribution, with three expressing an interest in developing their own streaming video platforms to disseminate IAMPs.

Distribution Wishes and Challenges for Producers

Producers are interested in the US educational market and understand the importance of alliances with higher education. They value film screenings and invitations to provide lectures. They also appreciate transparency about the acquisition process, look for fairness in academic licensing, and seek

information about including films in classroom activities. Producers also desire to build professional relationships with librarians and to understand their work. Terra Nostra noted: "We would want to know better how librarians and universities make their choice to decide to get some movies, and the criteria used by librarians to choose these kinds of movies." Producers also saw academic support in the form of financial opportunities and the adoption of films in the curriculum.

There are also challenges. Producers dislike competing with large blockbuster film studios and losing artistic control. Similar to film creators, producers encounter geo-restrictions that limit the reach of their work to a specific geographic region, or films receive rejections from major commercial distributors without any feedback.

Distribution Wishes and Challenges for Educational Distributors

The two educational distributors recognize the value of building a diverse catalog with as many Indigenous languages as possible. They view themselves as mediators between the film world and academic institutions. Sometimes, these distributors seek the license of a specific film, while in other instances, they request a broad catalog from a filmmaker or studio. Distributors stated that when there was interest in acquiring IAMPs, they had specific academic audiences in mind, such as constituents from Latin American Studies, Social Studies, and Indigenous Studies.

The distributors also noted that IAMPs were essential for developing transcultural skills, and that distributors could work directly with producers and/or sales agents to acquire films for their platforms. These distributors are aware of libraries' budgetary constraints, recognizing that annual subscriptions provide fair pricing. The distributors also showed interest in including "invisible voices" and keeping films out of "the minority closet." However, there were barriers. One distributor noted that locating IAMP creators and films in an Indigenous language was difficult. Additionally, one distributor (and one producer) reported concerns about film and sound quality, such as features filmed on cell phones. Lastly, language barriers make negotiations and communication challenging.

Although educational distributors noted the importance of including Indigenous voices on their platforms, they recognized issues with purchasing single titles and complicated payment transactions. They emphasized that films in an Indigenous language had to contain subtitles, and MARC records had to be created for customers. One distributor observed: "It's not ideal for us because we prefer to have as many titles as possible, so we prefer to establish agreements with vendors with an interesting catalog. Sometimes we must go title by title."

Several respondents did not have experience with educational video streaming databases, but they had exposure to commercial streaming video providers. The most common challenge was navigating complex and exclusive distribution agreements, which the interviewees saw as limiting the creators' freedom to show the films. The stotsil *realizador* noted:

> "One of the big problems with streaming platforms is that they think they reach everyone, but in reality, they do not because the Internet does not exist everywhere. Not everywhere there is the

desire to subscribe to these platforms. Or simply, the bandwidth is not enough. But of course, for the rest of the world with that infrastructure, it will be possible for those people to see the movie. I am split in half; on the one hand, I wanted to because it would also save me some of the emotional and physical work of promoting the film. But, on the other hand, I feel that these films I make are essential for contexts where the internet does not exist, or streaming does not exist. You have to carry those films on foot or in vans. Those are the two situations. But I do want to. I would like to find a [streaming platform] that [gives] me this freedom."

Discussion

This analysis focuses on mapping selection criteria; understanding the educational media market from a creator, producer, and educational distributor viewpoint; and examining reciprocal collaborative partnerships.

Mapping Selection Criteria

We start our discussion by referring to IAMPs' heterogeneous nature and its implications on selection criteria when building an Indigenous audiovisual collection from Latin American regions. As librarians involved in the acquisition and collection development of Indigenous-authored materials, we have experienced the intricacies of identifying what an Indigenous audiovisual work is. Is it a film with Indigenous actors directed by a non-Indigenous person? Or a film referring to Indigenous people from an ethnographic and anthropological standpoint? Or films presenting a topic of relevance for Indigenous persons from their perspective, but without their creative control? The questions were endless and somehow tended to disconnect the intellectual contributions of Indigenous and non-Indigenous persons.

We found that several scholars attempted to reinvent definitions for videos and films under the creative control of Indigenous persons without consensus. However, the interviewees gave us a clearer sense of the intricate conceptualization of IAMPs and, in a way, reaffirmed the definition that Domínguez made, acknowledging the contributions of non-Indigenous collaborators (by/with) in the production and distribution process. The interviewees helped us appreciate that, whether referring to long or short features or nonfiction works, animations, stotsil cinema, Quechua films, or community-based videos, as CEFREC noted, "cinema created without indigenous participation is not indigenous cinema." Notwithstanding, libraries should consider that some creators may prefer to separate their works from their identity. This reminds us not to generalize all audiovisual media created by Indigenous creators as a single genre and invites educational distributors to expand beyond the "ghetto" category of the "Indigenous cinema" label.

Acknowledging the complexity of this categorization may help us to consider selection criteria with flexibility as a starting point in the library acquisition process and subsequent educational distribution. However, as we move forward, we could also prioritize the metadata of bibliographic records and include terminology that Indigenous creators use when working with library vendors or developing

acquisition processes. Our findings showed that IAMPs spanned diverse formats, purposes, topics, and genres, all possible variables for selection criteria, and which could appeal to a library collection trying to satisfy curricular and research needs. For example, animations and short fictionalized and nonfictionalized documentaries could easily be introduced in classroom activities because of their brief length, especially if these works cover topics of curricular interest.

Similarly, the interviewees mentioned the presence of social activism as a purpose of their productions, discussing topics such as stereotypes, identity, cultural assimilation, and other issues that courses in the social sciences and the humanities may cover. Notably, Schiwy argued that Indigenous media are tools to "challenge common perceptions" about Indigenous people, a sentiment confirmed by the respondents who referred to their works as tools of empowerment designed for expressing specific messages and fighting back against stereotypes.[32] Promoting IAMPs as a research and reflection tool for campus constituents is one way librarians can argue for their adoption in the curriculum.

Another critical element of selection criteria is the presence of an Indigenous language in audiovisual materials, and more if its role is to assert the cultural heritage the language carries. We sensed the connection of language and cultural heritage when the stotsil *realizador* and Terra Nostra purposefully referred to stotsil cinema, highlighting the importance of language and nation.

However, CEFREC cautioned that "making a film in Indigenous languages is not the same as promoting Indigenous cinema." This assertion revealed the sensitivities of the increased number of famous films that although they include an Indigenous language, it is unclear how much Indigenous creative control they have. This is the case of well-known features such as *Embrace of the Serpent*, *Retablo*, and *Roma*, which have an Indigenous language, but it is unclear how much Indigenous intellectual contributions they had or whether these contributions were remunerated.

Another interesting detail was the spelling reference in the word "stotsil." The distinction of the spelling of the word "stotsil" with an "s," instead of the English spelling with a "z" used by anthropologists, reminded us of the clashes with academia. There is an unspoken view that academia constructs Indigenous people without them. This consideration might sound trivial, but it matters regarding bibliographic records because we should utilize the terminology accepted by the corresponding Indigenous people instead of the terminology constructed by the dominant society.

Selection criteria also consider the target audience. However, in the case of academic collections serving disciplinary studies such as education, the target audience may expand to various ages. While we collect audiovisual works to support higher education members' curricular and research needs, some works, with a target audience of K-12 students, also serve as essential materials that future educators can use in their curriculum development. This was the case of *68 Voces* whose short videos, made with Indigenous children's illustrations and inspired by the community elders, connected with heritage and education.

Age-related audiovisual materials allow academic librarians to discuss IAMPs from an all-age-inclusive target audience perspective. It is more than a question about age-appropriate materials, because academic libraries may or may not serve K-12 students as directly as public and school libraries do.

However, it is a matter of materials that future K-12 teachers may use to create their curricula or classroom activities, as well as materials that faculty and students may utilize in their research projects, even if these materials target younger audiences.

Understanding Distribution from the Creator, Producer, and Distributor Viewpoints

Reciprocal Collaborative Partnerships

Our findings show that IAMPs had diverse distribution pathways, including commercial and educational distributors and free-to-view channels like Vimeo and YouTube. The notion of free access resonated powerfully with the interviewees because sharing audiovisual works was a part of reciprocity wisdom—a way of paying forward to the communities collaborating in the production or simply sharing knowledge openly and without a paywall.

Apart from these platforms, many interviewees agreed that film festivals were crucial for distributing their works because these festivals provided exposure, discovery, and a connection to the educational market. As librarians attend book fairs to learn about new books in the market, attending Indigenous film festivals could be another acquisition path for librarians and educational distributors. This method to find IAMPs requires a budget, intentionality, and planning, especially because academic institutions usually cannot purchase films at the time of their premiere and must wait until the festival circuit has been completed. Nonetheless, attending film festivals offers an opportunity to locate these audiovisual materials and, more importantly, forge relationships.

Another benefit of attending film festivals was uncovering IAMPs' different aesthetics. Cordova noted that many Indigenous works targeted an Indigenous audience with non-mainstream pacing, dialogues, and script formats.[33] This is especially important because established distributors grapple with licensing materials that challenge mainstream aesthetics. For example, a "slow pace" or perceived low film quality may negatively impact a film's chance of being included in an academic vendor's offerings.

Nonetheless, aesthetics opens a window for non-mainstream audiovisual representations, emphasizing the role of librarians, offering access to these works, and inviting distributors to accept these non-mainstream aesthetics in their catalogs, even if they do not align with conventional media representations. There may be times when librarians must expand beyond traditional vendors to establish distribution relationships directly with Indigenous creators and organizations.

The study also revealed that distribution to universities in the United States was challenging without a straightforward acquisition process for finding and purchasing IAMP. On one hand, we learned that traditional film acquisition practices for higher education, such as buying DVDs or licensing streaming video, were novel concepts for Indigenous creators, and cost and technical barriers prevented them from participating in these formats. On the other hand, creators celebrated streaming licenses as a format that allowed them to deliver digital files across borders. Still, nuanced licensing terms and payment structures were challenging to navigate.

Despite these challenges, creators and academic distributors strongly desired to distribute IAMP to academic audiences. Producers, *realizadores*, and *colectivos*' wishes surpassed the mere monetary compensation for their work. What mattered to the interviewees was cultivating a space for open dialogue and reflection. Naturally, creators and producers need money to keep producing films and training, but the nucleus of their work relies on thematic and creative knowledge sharing, followed by discussion.

This juxtaposition between money and knowledge sharing communicates to academic libraries the importance of negotiation over pricing. Instead of the budget being the primary concern in decision-making, one could focus on bringing to universities the representation of different ways of knowing and creative expression at a pace that works with our budgets. This assertion does not refute the importance of budgetary restrictions in academic libraries. Still, it inverts the focal point and welcomes negotiations about the item's price and use from a reciprocal perspective.

Both educational distributors we interviewed appear to have IAMP among their Indigenous collections. Pragda's *Indigenous Peoples* collection features Indigenous people in Latin America, and Digitalia Film Library offers a small number of films tagged as "Indigenous." As of the writing of this paper, Kanopy hosts 707 films labeled Indigenous Studies, and 339 films labeled "Indigenous" (with overlap between the two categories). Alexander Street's *Indigenous Peoples* collection provides access to audio and video resources that broadly include ethnographic films about Indigenous people. This data confirms that educational distributors have a working acquisition model that could easily integrate IAMP. We also acknowledge that a bridge is needed between IAMP creators and producers and educational distributors in the United States.

IAMP creators wanted to understand how librarians acquire films on these platforms and how they could be included in these database products. Additionally, several respondents did not know about distribution rights, how to offer their films to educational video streaming databases, who to contact in academia, how licensing works, or the role of libraries in distribution. Therefore, librarians may play a bridging role, helping creators connect with these database providers or describe the benefits of working with universities directly.

Lastly, a relevant unspoken barrier for distribution was the language barrier between distributors and creators. Surprisingly, we noticed that the interviewees and librarians shared similar challenges related to language barriers during the initial negotiation process and the end stages of payment. We assumed that just like not all librarians spoke Spanish, not all those involved in the selling and distributing of IAMP spoke English. We noticed these language barriers during the interviews, which attested to the importance of having bilingual librarians involved during the acquisition process.

Overcoming this language barrier is indispensable considering creators' and producers' appreciation for transparency regarding academic licensing. This transparency can translate into straightforward license contracts, stipulating a price that includes bank transaction fees and ensuring that IAMP creators do not lose artistic control, a topic of concern to them.

Reciprocal Collaborative Partnerships

A recurring theme in all the interviews was collaborative partnerships rooted in trust and fairness, invoking the notion of *Ayni* (reciprocity). For IAMP creators, this meant working with Indigenous and non-Indigenous allies to develop stories, fund them, and produce them collaboratively. For librarians, *Ayni* could manifest in establishing equitable and fair negotiation practices where our decisions are made cooperatively and transparently. Another way librarians can invoke the theme of *Ayni* is by ensuring bibliographic records capture the names of directors, photographers, languages, filming locations, and Indigenous communities.

To some extent, academic librarians are well positioned to practice reciprocity by sharing knowledge about the library acquisition process, including license agreements and pricing structures. In addition, reciprocity may also mean that librarians can connect creators with educational distributors for information about film distribution's technical and curatorial aspects in the United States. From an acquisition viewpoint, contemplating collaborative partnerships opens a path to assessing materials under the creative control of Indigenous people and by/with produced works. For academic libraries, this consideration implies more than assessing subject matter and format; it unlocks conversations about knowledge creation and representation in our collections of works conceived and created outside the norm.

Conclusion

This study represents the first examination of IAMPs from Latin American regions through an acquisition and educational distribution perspective within the United States. By focusing on the opportunities and challenges, we hope to start a new conversation about acquisition pathways and deepen our understanding of the complexities surrounding IAMPs. As films continue to enter the higher-education curricula in various subjects, we hope this study offers a glance into the views of some of the creators and producers of IAMPs and academic distributors. Indigenous creators and educational distributors face many difficulties that impact the ability of libraries to purchase and provide access to IAMPs. For librarians, examining these views and challenges may be a starting point to bridge the gap in acquiring and distributing IAMPs from a better-informed position, guided by the principles of reciprocal and collaborative partnerships.

Acknowledgments

We wish to thank all study participants for sharing their experiences, expertise, and dreams. We also thank Daisy Domínguez Singh, Amalia Córdova, and Freya Schiwy for helping to identify distributors and creators of IAMPs.

Credit Statement

Kathia Ibacache: Conceptualization, data curation, formal analysis, investigation, methodology, project administration, writing—original draft, writing—translations, and writing—review and editing. Arthur

Aguilera: data curation, formal analysis, investigation, methodology, writing—original draft, and writing—review and editing.

Appendix A

English Invitation to Participate

Hello!

You are invited to participate in a research semi-structured interview conducted by two librarians at the University of Colorado Boulder, a research institution in the United States of America.

The purpose of this interview is to collect data examining how producers, directors, or distributors of Indigenous cinema from Latin American countries work with university libraries and academic streaming video providers in the United States of America. This research involves no risk to the subjects. The information gathered in the interview may be published for scientific purposes. Your personal identification will be kept confidential to the extent the U.S. law allows.

This interview should last about thirty minutes and will be conducted through Zoom and recorded to analyze responses.

It is assumed that, by participating in the interview, you consent to participate in this study voluntarily. You can terminate your participation at any point during the interview.

Please see the attached Informed Consent for more information about this study, and what you can expect if you participate. If you agree to the terms in the document, please respond to this email so we may schedule an interview time.

Sincerely,

Kathia Ibacache & Arthur Aguilera
Co-Investigators
University of Colorado Boulder

Spanish Invitation to Participate

Hola!

Le invitamos a participar en una entrevista semi-estructurada de 30 minutos conducida por dos bibliotecarios de la Universidad de Colorado Boulder, la cual es una institución de investigación en los Estados Unidos.

El propósito de esta entrevista es reunir datos para examinar cómo los productores, directores, o distribuidores de películas indígenas en Latino América trabajan con bibliotecas universitarias y proveedores de servicios de transmisión de video (video streaming databases) de índole académico en los Estados Unidos.

Esta investigación no tiene riesgo para los entrevistados. La información recopilada en la entrevista podrá publicarse con fines científicos. Su identificación personal se mantendrá confidencial en la medida que lo permita la ley de los Estados Unidos.

Esta entrevista debería durar alrededor de 30 minutos y será conducida en Zoom y grabada para que los co-investigadores puedan analizar las respuestas.

Asumimos que al participar en esta entrevista lo ha hecho de forma voluntariamente. Sin embargo, usted puede cancelar su participación en cualquier momento.

Por favor vea el documento adjunto que tiene el consentimiento informado para obtener más información sobre este estudio y lo que puede esperar si participa. Si acepta los términos del documento, responda a este correo electrónico para que podamos programar una cita para la entrevista.

Sinceramente,

Kathia Ibacache & Arthur Aguilera
Co-Investigadores
University of Colorado Boulder

ENGLISH CONSENT FORM

IRB Protocol Number: 23-0414

Investigator: *Arthur Aguilera, Kathia Ibacache*

Key Information

You are being invited to participate in a research interview conducted by Arthur Aguilera and Kathia Ibacache, librarians and researchers at the University of Colorado Boulder. The interview will be conducted through Zoom and will not exceed 30 minutes.

Purpose of the Study

The purpose of this research is to examine how Indigenous Cinema is distributed to academic institutions in the United States of America. We are interested to learn about the challenges and the benefits for Indigenous cinema's directors, producers, and distributors from Latin America to establish communication and film acquisition opportunities with the university library film market in the United States.

This study investigates the strategies, communication pathways, and challenges directors, producers, and distributors involved in Indigenous cinema encounter when offering these films and entering the US video streaming databases and the university market.

We intend to provide the wider profession with an understanding of the current challenges and opportunities to offer access to these films.

This study will benefit librarians with collection development responsibilities by expanding their understanding of the procedures, practices, and barriers to access Indigenous cinema from Latin America and possible recommendations to curtail this issue.

We expect that you will participate in a 30-minute interview. The interview will be recorded for notetaking and data validation purposes.

Voluntary Participation and Withdrawal

Whether or not you take part in this research is your choice. You can terminate the interview at any time and it will not be held against you. Any notes or interview footage that is recorded will be deleted if you withdraw from the study.

Confidentiality

Information obtained about you for this study will be kept confidential to the extent allowed by law. The information from this research may be published in academic publications; however, your identity will not be given out.

Questions

If you have any questions, concerns, or complaints, please contact Arthur Aguilera (arthur.aguilera@colorado.edu) and Kathia Ibacache (kathia.ibacache@colorado.edu).

This research has been reviewed and approved by an IRB. You may talk to them at (303) 735-3702 or irbadmin@colorado.edu if:

- Your questions, concerns, or complaints are not being answered by the research team.
- You cannot reach the research team.
- You want to talk to someone besides the research team.
- You have questions about your rights as a research subject.
- You want to get information or provide input about this research.

Consent

Please respond to the email solicitation email to give your written consent to participate. You will be asked to give verbal consent at the beginning of the interview.

SPANISH CONSENT FORM

Permiso para participar en un estudio de investigación con humanos

IRB Protocol Number: 23-0414

Investigadores: Arthur Aguilera, Kathia Ibacache

Información Importante

Está invitado a participar en una entrevista de investigación realizada por Arthur Aguilera y Kathia Ibacache, bibliotecarios e investigadores de la Universidad de Colorado Boulder. La entrevista se realizará a través de Zoom y no excederá los 30 minutos.

Propósito del Estudio

El propósito de esta investigación es examinar cómo se distribuye el cine indígena a las instituciones académicas de los Estados Unidos. Nos interesa conocer qué desafíos y beneficios han tenido o considerado los directores, productores y distribuidores de cine indígena de América Latina para establecer oportunidades de comunicación y venta de películas con el mercado cinematográfico de las bibliotecas universitarias en los Estados Unidos.

Este estudio investiga las estrategias, las vías de comunicación y los desafíos que enfrentan los directores, productores y distribuidores involucrados en el cine indígena al ofrecer estas películas y entrar al mercado de los proveedores de servicios de transmisión de video (US video streaming databases) de Estados Unidos y al mercado universitario. Tenemos la intención de brindar a la profesión en general una comprensión de los desafíos y oportunidades actuales para ofrecer acceso a estas películas.

Este estudio beneficiará a los bibliotecarios que incluyen en sus responsabilidades el desarrollo de la colecciones al ampliar su comprensión de los procedimientos, prácticas y barreras para acceder al cine indígena de América Latina y entregar posibles recomendaciones para reducir este problema.

Esperamos que participe en una entrevista de 30 minutos. La entrevista será grabada para tomar notas y validar los datos.

Participación y Retiro Voluntario

Su participación en esta investigación es voluntaria. Usted puede terminar la entrevista en cualquier momento y no se le reprochará. Cualquier nota o material de entrevista grabado se eliminará si se retira del estudio.

Confidencialidad

La información obtenida sobre usted en este estudio se mantendrá confidencial en la medida permitida por la ley. Los datos revelados en la entrevista y del estudio podrán publicarse en publicaciones académicas; sin embargo, su identidad no será revelada.

Preguntas

Si tiene alguna pregunta, inquietud o queja, comuníquese con

Arthur Aguilera (arthur.aguilera@colorado.edu) and Kathia Ibacache (kathia.ibacache@colorado.edu).

Esta investigación ha sido revisada y aprobada por un IRB. Puedes hablar con ellos en (303) 735-3702 or irbadmin@colorado.edu si:

- El equipo de investigación no responde a sus preguntas, inquietudes o quejas.
- No ha podido comunicarse con el equipo de investigación.
- Quiere hablar con alguien además del equipo de investigación.
- Tiene preguntas sobre sus derechos como sujeto de investigación
- Quiere obtener información o proporcionar comentarios sobre esta investigación.

Consentimiento

Por favor, responda al correo electrónico de solicitud para dar su consentimiento por escrito para participar. Se le pedirá que dé su consentimiento oral al comienzo de la entrevista.

Notes

1. Peter Baker, "Imaginaries of Abya Yala: Indigenous Filmmaking in Latin America from a Multimodal Semiotic Perspective," *Latin American and Caribbean Ethnic Studies* 18, no. 3 (2023): 378, https://doi.org/10.1080/17442222.2022.2149230.

2. Baker calls it Indigenous film and media, "Imaginaries of Abya Yala." Baker adds that several Indigenous filmmakers refer to their cinematic productions as intercultural cinema or intercultural communication, which denotes communication among people from different cultures, 381; Juan Francisco Salazar and Amalia Córdova call it Indigenous video, "Imperfect Media and the Poetics of Indigenous Video in Latin America." In Pamela Wilson and Michelle Stewart, eds., *Global Indigenous Media: Cultures, Poetics, and Politics* (Durham, NC: Duke University Press, 2008), https://doi-org.colorado.idm.oclc.org/10.1215/9780822388692. Freya Schiwy calls it Indigenous media, "Indigenous Media and the Market," *Indianizing Film: Decolonization, the Andes, and the Question of Technology* (Ithaca, NY: Rutgers University Press, 2009), https://doi.org/10.36019/9780813547138-010. Carolina Soler calls it "cine indígena," "Cine indígena en Latinoamérica, un acercamiento a sus implicaciones sociales y políticas," *XI Congreso Argentino de Antropología Social* (2014).

3. Houston Wood, "Dimensions of Difference in Indigenous Film," in *Native Americans on Film: Conversations, Teaching, and Theory*, ed. Elise Marubbio and Eric L. Buffalohead (Lexington, KY: The University Press of Kentucky, 2013), 35.

4. Pamela Wilson, Joanna Hearne, Amalia Córdova, and Sabra Thorner, *Indigenous Media* (Oxford Bibliographies, 2014), doi: 10.1093/obo/9780199791286-0229.

5. Baker, "Imaginaries of Abya Yala," 378, 391.

6. Dinazar Urbina, "Caminos del Cine Indígena. Del Esteroetipo a la Autorrepresentación," *II Lab for the Development of Film Projects for Indigenous and Afro-descendant Filmmakers of Latin America at the Morelia Film Festival*, 22nd ed. (2024), https://moreliafilmfest.com/en/caminos-del-cine-indigena-del-estereotipo-la-autorrepresentacion-was-held-part-22nd-ficm?form=MG0AV3.

7. Mariana Lacunza, "Latin American Film in the Digital Age," in *The Routledge Companion to Latin American Cinema* (Routledge, 2017), 367; Baker, "Imaginaries of Abya Yala," 378.

8. Salazar and Córdova, "Imperfect Media and the Poetics of Indigenous Video in Latin America," 39–40.

9. Francisco Javier Gómez Tarin, "Cine e indigenismo: la imagen externa: Tarahumara (Luisc Alcoriza, 1964) como muestra," *Contacto Interlingüístico e Intercultural en el Mundo Hispano* 2, no. 10 (2001): 2, https://arquivo.bocc.ubi.pt/pag/tarin-francisco-cine-indigenismo.pdf.

10. Gómez Tarin, "Cine e indigenismo," 2.

11. Salazar and Córdova, "Imperfect Media and the Poetics of Indigenous Video in Latin America," 45.

12. Daisy Domínguez, "Indigenous Film and Video in Latin America: Starting Points for Collection Development," in *Women in Latin American Studies*: *Reshaping the Boundaries, Papers for the Forty-Ninth Annual Meeting of the Seminar on the Acquisition of Latin American Library Materials*, ed. Angela Carreno (Michigan, 2004), 82.

13. Domínguez, 82.

14. Javier Muñoz-Díaz, Kathia Ibacache, and Leila Gómez, *Indigenous Materials in Libraries and the Curriculum*: *Latin American and Latinx Sources* (Routledge, 2024), 26. "By/with" is a terminology coined by Javier Muñoz-Díaz to refer to works that were the product of collaborations between Indigenous and non-Indigenous persons and works that, although they were authored by an non-Indigenous person, they were made from an Indigenous perspective.

15. Amalia Córdova, "The Money Problem," *Cultural Survival Quarterly* 29, no. 2 (2005); Baker, "Imaginaries of Abya Yala," 378–9.

16. Audiovisual works were identified as "useful artifact[s] for learning" despite advancing technology and high costs of film for academic communities, Mitchell Whichard, "Collection Development and Nonprint Materials in Academic Libraries," *Library Trends* 34, no. 1 (1985): 37, 49.

17. deg farrelly, "Issues in Academic Library Streaming Video," *Journal of Digital Media Management* 5, no. 2 (2016): 170.

18. Danielle M. Cooper, Dylan Ruediger, and Makala Skinner, *Streaming Media Licensing and Purchasing Practices at Academic Libraries*: *Survey Results* (Ithaka S+R Research Report, 2022), 6.

19. Debora Lee, "Indigenous Studies Library Collection Development Toolkit," University of Saskatchewan (2023), 13, https://hdl.handle.net/10388/14484.

20. Luisela Alvaray, "Transnational Networks of Financing and Distribution: International Co-productions," in *The Routledge Companion to Latin American Cinema*, eds. Marvin D'Lugo, Ana Lopez, and Laura Podalsky (London: Routledge, 2018), 253.

21. Baker, "Imaginaries of Abya Yala," 385, 389–391.

22. Muñoz-Díaz, Ibacache, and Leila Gómez, *Indigenous Materials in Libraries and the Curriculum*, 279.

23. Muñoz-Díaz, Ibacache, and Leila Gómez, 279.

24. Muñoz-Díaz, Ibacache, and Leila Gómez, 279–80.

25. Freya Schiwy, "Film, Indigenous Video, and the Lettered City's Visual Economy Revisited," in *A Companion to Latin American Literature and Culture*, 2nd ed., ed. Sara Castro-Klaren, (Hoboken, NJ: John Wiley & Sons, 2022), 596.

26. Jesús Alonso-Regalado, "Latin American and Spanish Online Videos: Vendor Offerings for US Academic Libraries," *Collection Building* 29, no. 1 (2010): 35.

27. Victoria Clarke and Virginia Braun, "Teaching Thematic Analysis: Overcoming Challenges and Developing Strategies for Effective Learning," *The Psychologist* 26, no. 2 (2013): 120–123.

28. Scholars have referred to Indigenous artists using "new technologies" to express various communication and artistic production styles connected to "local aesthetics"; see Pamela Wilson and Michelle Stewart, "Introduction: Indigeneity and Indigenous Media on the Global Stage," *Global Indigenous Media: Cultures, Poetics, and Politics* (Duke University Press, 2008), 2, https://doi-org.colorado.idm.oclc.org/10.1215/9780822388692.

29. *Cosmovisión* is defined as a notion that helps us understand cultural diversity and the existence of the "other," based on the relationship Indigenous people have with Mother Earth, the supernatural, and their conception of work and community; see Samuel Luis Villela Flores, "Cosmovisión Indígena," *Universidad Nacional Autónoma de México*, https://www.nacionmulticultural.unam.mx/edespig/diagnostico_y_perspectivas/diversidad_etnica/1%20DIVERSIDAD%20ETNICA%20Y%20LINGUISTICA/4%20COSMOVISION%20INDIGENA/Estado%20del%20desarrollo%20(Cap%2013).pdf.

30. A sentiment against the romanticization of Native Americans has been felt by Indigenous people throughout the Americas. Citing Pawnee/Yakama artist Bunky Echo-Hawk, Pamela Wilson and Michelle Stewart noted that mass media has been used to romanticize Native Americans, promoting "negative stereotypes," and to try to convince people that Native Americans are something from the past; see Wilson and Stewart, "Introduction: Indigeneity and Indigenous Media on the Global Stage," 3.

31. According to Américo Mendoza-Mori, the Quechua term *Ayni* denotes reciprocity and collaboration, and is an ontology that people in the Andes practice; see "Indigenous Knowledge Systems and Public Humanities: *Ayni* as Community Engagement," *PMLA* 140, no. 1 (2025): 161, https://doi.org/10.1632/S0030812925000082.

32. Freya Schiwy, "Indigenous Media and the Politics of Knowledge," *Indianizing Film: Decolonization, the Andes, and the Question of Technology* (New Brunswick, NJ: Rutgers University Press, 2009), 39.

33. Córdova, "The Money Problem," 18.

Environmental Scan of Critical and Inclusive Cataloging/Metadata Projects in US Academic Libraries

Tiffany Henry

With a surge of attention on improving EDI (equity, diversity, and inclusion) within the LIS profession in recent years, numerous metadata and cataloging projects have been initiated to address these issues. In this study, the author explores the types of critical cataloging and inclusive metadata projects that cataloging/metadata professionals within academic libraries in the United States are engaging in, whether these projects are reaching completion, and the supports or barriers these professionals encounter. This study reports on a survey of cataloging and metadata professionals in US academic libraries who have either completed, initiated, or have incomplete critical cataloging projects within the past five years to examine their experiences. This research contributes to the literature by offering contextualized analysis of the efforts undertaken by cataloging/metadata professionals to advance EDI.

Introduction

In recent years, there has been a resurgence in improving equity, diversity, and inclusion (EDI) within cataloging, metadata creation, and resource description. To aid catalogers, archivists, and metadata specialists in these endeavors, there are published resources to help guide practitioners. Some popular and often cited resources around EDI include *Archives of Black Lives in Philadelphia: Anti-racist Description Resources* and OCLC's *Reimagine Descriptive Workflows: A Community-Informed Agenda for Reparative and Inclusive Descriptive Practice*.[1] Additionally, there are also themed professional meetings like the Metadata Justice in Oklahoma Libraries and Archives Symposium that provide a venue to share complete and ongoing projects, and inspire others to take on similar work.[2] At the core of these efforts is a focus on enhancing description of and access to library and archival resources for the sake of inclusion and social justice.

The emphasis on social justice in cataloging, metadata, and resource description is rooted in improving user access to collections and fostering inclusion and belonging for all library and archive users. Projects that promote these things can appear in many different forms—by highlighting blind spots within library collections and their descriptions, enhancing discovery of resources by updating search terms, or mitigating potential harm to users by adding content warning statements. With so many avenues for addressing EDI and promoting social justice, establishing the state of this work within academic libraries in recent years is challenging.

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This study provides an environmental scan of academic libraries engaging in just this kind of work—cataloging, metadata, or resource description projects with a focus on improving EDI. The author surveyed library and information science (LIS) professionals in academic libraries or archives specializing in resource description who have engaged in EDI-focused projects in recent years to learn more about their experiences. To efficiently describe the concept of EDI work within library resource description in this study, the author uses both "critical cataloging" and "inclusive cataloging." Inclusive cataloging is the broader term of the two and encompasses a wide variety of tasks that address EDI issues in resource description. To quote Fox and Gross, "Radical cataloging, critical cataloging, inclusive description, reparative description, ethical metadata, conscious editing, metadata justice: these are just some of the terms used in libraries and archives to address prejudice and marginalization in description and classification."[3] On the other hand, critical cataloging as defined by Watson is "a social justice-oriented style of radical cataloging that places an emphasis on radical empathy, outreach work, and recognizes the importance of information maintenance and care."[4] Both "inclusive cataloging" and "critical cataloging" will be utilized throughout this study as catch-all terms for the diverse array of EDI-focused projects.

Literature Review

Within the body of LIS literature, there is an abundance of scholarship about both inclusive and critical cataloging written over several decades. Although the terminology has shifted over time, at its core it is still the same work.[5] Awareness of inclusive cataloging's history is integral to understanding the current professional landscape. Fox and Gross trace the modern history of inclusive cataloging efforts in US libraries. The authors examine inclusive cataloging work impacting various marginalized groups within the chapter. An example of this includes forerunners such as the group of librarians at Howard University addressing issues with classification and subject headings for materials about African Americans as early as the 1930s and 1940s.[6] They also cover other historical inflection points including the growth of radical cataloging in the 1970s with the work of Sandy Berman at the Hennepin County Public Library, and critical cataloging starting as an offshoot of critical librarianship in the 2010s.[7]

Many case studies have been published in recent years on different dimensions of inclusive or critical cataloging work in academic libraries and archives. The work shared in these case studies encompasses a wide range of projects and approaches with some common categories. One common type of case study is remediation of resource descriptions. Remediation in this context involves revising or updating the language used to describe library resources, such as archival finding aids or metadata for digital collections. In a case study by Dean, the author describes the remediation process conducted at UNC Chapel Hill for some of their archival collections. Referred to as conscious editing, the case study outlines the process taken to address the language used by many of the legacy finding aid descriptions within their Southern Historical Collection.[8] Lake and Nicholson take a mixed methods approach to their remediation of digital collection descriptions at UNC Charlotte. To inform the remediation project, the authors conducted both a campus survey and semistructured interviews to understand which identity group terms are preferred by users.[9] This resulted in not only understanding user preferences

for terminology, but preferences around including metadata for resource creator/contributor identity characteristics and including sensitive content statements for online digital collections. The case study by Rowan and Gonzalez outlines the approach taken at Florida International University to address and remediate harmful language and embark on an equitable metadata initiative focused on their online digital collections. The authors tackle harmful and discriminatory language around race, religion, sexuality, age, ability, and culture, plus laudatory language found within resource descriptions.[10] This case study directly mentions the systemic issues that are ever-present challenges to engaging in description remediation, such as archivist bias, archival silences, and the tension between institutional stewardship and community ownership.[11]

Another common type of case study seen from academic libraries is the implementation of alternative controlled vocabularies (CVs). This typically involves incorporating a CV other than the ubiquitous Library of Congress Subject Headings (LCSH) in catalog records to enhance subject access. In their case study, Hardesty and Nolan describe the process of creating an overlay for specific LCSHs with corresponding terms from the Homosaurus CV within Indiana University's library catalog. The authors devise an overlay using JavaScript and linked data to display terms from Homosaurus to users instead of the originally assigned LCSH.[12] This was done with the goal of mitigating harm to users and researchers by replacing potentially derogatory terminology about the LGBTQ+ community still in use within LCSH with alternates from Homosaurus.[13] Tanaka, Michael, and Slutskaya take a similar approach by creating an automated method to incorporate the Homosaurus CV into Emory University's library catalog. The authors collaborated with a vendor, Backstage Library Works, to automatically update MARC records within their catalog with terms from Homosaurus when a corresponding term from LCSH was present.[14] Although the use of an automated process offered benefits like a greater number of updated records, potential time savings, and larger breadth of coverage, the authors also noted limitations, such as the quality of existing subject analysis in records or any ambiguous headings encountered that still require human intervention.[15]

Efforts to change and update terminology in CVs to address known issues are yet another common project type among case studies. Alterations to CVs can come in the form of local-level adjustments that are specific to an institution or larger updates to the CV itself by the organization or community responsible for its creation and management. In another case study by Lake and Nicholson, the authors run an evaluation Faceted Application of Subject Terminology (FAST) for EDI issues for both UNC Charlotte's online digital collections and institutional repository. This evaluation encompassed two projects—the first being the formation of a diversity, equity, inclusion, and accessibility (DEIA) working group to initiate a reparative cataloging project for subject terms within the online digital collections.[16] The second project involved in the evaluation was to remediate subject headings used for legacy electronic theses and dissertations according to newly established local guidelines created by the DEIA working group.[17] Bychowski, Hildebrand, Hoover, and Reno delve into both the history of the Rare Book and Manuscript Section Controlled Vocabulary for Rare Materials Cataloging (RBMS CVRMC) and present a case study on changing the language used for terms relating to prejudicial materials. Before finalizing the latest edition of RBMS CVRMC, the vocabulary editorial working group addressed legacy

language concerning "literature of prejudice" or genre terms that convey prejudice against specific identity groups, Blackface minstrelsy, colonization, and slavery.[18]

Addressing issues with classification and the management of personal name authorities are other areas of focus for recent case studies. A case study by Tosaka explores the process of a retrospective reclassification project. For this project, the author worked to change a portion of the assigned Library of Congress Classification numbers on materials about Black people and African Americans held by their library.[19] Due to the size of the cataloging staff at the College of New Jersey, Tosaka outlines how the project was condensed and automated in a way to be impactful and efficient without overburdening a small team.[20] Yon, Baldoni, and Willey report on the creation of local guidelines for managing personal name changes for campus researchers at Illinois State University. After a request to update a faculty member's name in the catalog, the authors collaborated with others at their library to develop guidelines on determining when, where, and how to update personal names in systems under their purview.[21] The process raised awareness of the complexity of issues with identity management in academic library systems, plus the evolving tension between more inclusive community of practice guidance and the current descriptive cataloging standards.[22]

Aside from case studies, there is recent research within LIS literature that closely examines the experience of practitioners and frameworks to help guide the assessment of inclusive and critical cataloging work. In contrast to the case studies that focus on initiatives at an institutional level, these pieces of scholarship examine other components to this type of work. Perera examines the practitioners who initiate and participate in inclusive metadata work.[23] The study focuses on building a better understanding of who performs this work and generating a practitioner-derived definition of inclusive cataloging. Luke and Mizota conduct a cross-institutional study of practitioners in Galleries, Libraries, Archives, and Museums (GLAM) institutions who have worked on reparative description initiatives in the United States to better understand why they began, practical aspects, barriers, and sustainability of these initiatives.[24] As a result of their findings, the authors developed a framework that institutions doing similar work can adapt. The maturity model for reparative description is a flexible framework that institutions can adapt to help them assess, evaluate, and benchmark reparative description work at an institutional level.[25] Jaffe assesses the professional frameworks used to measure the value and quality of the library metadata. The author argues that with increased attention on metadata as a means of representation and EDI efforts, existing metrics for evaluating metadata quality need to expand.[26] The study by Theimer is an assessment of the resources to engage in inclusive metadata and critical cataloging projects. By evaluating the cost, quality, public impact, and alignment with institutional mission statements of three stand-alone critical cataloging projects, the author brings attention to the need to shift metrics for productivity and effectiveness away from quantity or cost alone.[27]

Methods

The research instrument for this study is a self-administered online survey created in Qualtrics. All survey questions are available in Appendix A. Before distribution, the survey was pilot tested

by five other LIS professionals who either previously worked or currently work as cataloging/metadata specialists themselves. Refinements to the survey were made based on pilot tester feedback. Institutional Review Board approval was granted, and the survey was marked exempt before participants were recruited. No personally identifiable information was collected in the survey, and results are reported in the aggregate. Informed consent information was presented to all participants at the beginning of the survey.

To recruit participants, the author sent the survey to multiple LIS email lists and professional online spaces. These include the AutoCat email list, RadCat email list, ALA Connect for the Metadata and Collections Section, and the Cataloging Lab's Critcatenate monthly news roundup. The survey opened in late October 2024 and remained available until December 2024. Convenience sampling was used for this study, meaning that the participant pool consisted of any eligible professionals who saw the recruitment message online.

A total of 172 respondents consented to participate. To capture a population of LIS workers who have both the expertise and regular engagement with library resource description, cataloging, and metadata creation, one screening question was added to the survey. It asks participants whether they are either currently or previously working as cataloging/metadata specialists in an academic library along with a definition. In this context, cataloging/metadata specialists are defined as LIS professionals who have more than 50 percent of their work time allotted to perform descriptive cataloging and metadata work regardless of formal job title. These criteria were set to ensure that a variety of LIS professionals who engage in this type of work in academic libraries could answer regardless of job rank, title, or classification. Out of the initial 172 participants, 137 answered "yes" to the screening question.

The remaining survey questions asked participants about their experiences with critical cataloging or EDI-based projects at their current or previous academic library. Specific questions dealt with the types of projects participants have worked on, length of time engaged in critical cataloging, experiences regarding levels of support and resource allocation, team size, and the Carnegie Classification designation of their affiliated college or university. Frequency distribution was used to understand the number of instances and observe trends for most of the quantitative data collected. A chi-square (χ^2) test of independence was conducted for survey questions 6 and 7 to determine whether there were any correlations between variables.

Findings

Project Types and Length of Time Engaged

After the screening question, survey participants were asked about the kinds of critical cataloging projects they have worked on and the length of time their institution has been engaged in this work. Respondents were requested to select any of the following project categories applicable to their experience: implementation of alternate CVs or genre terms ("yes," 70.08 percent), changes or remediation to assigned classification numbers ("yes," 64.23 percent), subject heading or CV

remediation ("yes," 73.77 percent), updating or altering resource description ("yes," 67.24 percent), creation or implementation of a harmful language statement ("yes," 64.23 percent), or work on name authority records ("yes," 42.5 percent) (figure 1).

Project Type	Yes	No	Totals (by Row)
1. Implemented alternative controlled vocabularies for subject headings and/ or genre terms	89	38	127
2. Changed or remediated assigned classification numbers	79	44	123
3. Changed or remediated controlled vocabularies or subject headings already in use	90	32	122
4. Updated/altered descriptions of resources	78	38	116
5. Created/implemented harmful language statement	66	56	122
6. Changed/edited name authority records	51	69	120

Figure 1. Types of critical cataloging projects worked on by academic libraries.

When asked about the length of time engaged in these projects ($n = 119$), the most common response from participants was 4–5 years (36.97 percent) followed by 2–3 years (34.45 percent). Some respondents reported a year or less of engagement (0–1 year, 15.97 percent), while fewer answered 5–9 years (11.76 percent) or 10 or more years (0.84 percent) (figure 2).
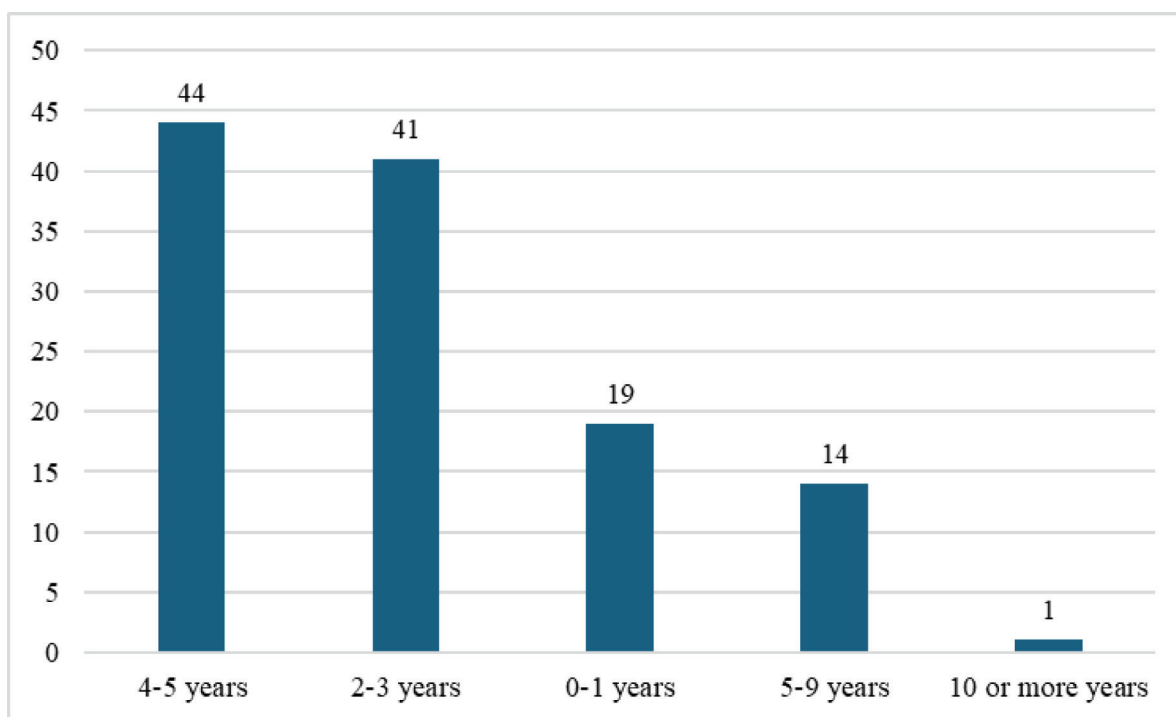
Figure 2. Years of engagement in critical cataloging projects ($n = 119$).

Project Status

When asked about the status of their most recent project (*n* = 117), most respondents answered that it is ongoing/currently underway (68.38 percent). Other reported answers for the same question include complete (17.09 percent), incomplete with the intention to finish at a later time (11.11 percent), and incomplete with no intention to return later (3.42 percent) (figure 3). As a direct follow-up to the previous question, participants were asked about the continuation status of their most recent project (*n* = 103). Participants overwhelmingly reported (78.64 percent) that the most recent project worked on has become a regular duty or ongoing workflow, while only 21.36 percent of respondents selected not applicable (N/A) (figure 4).
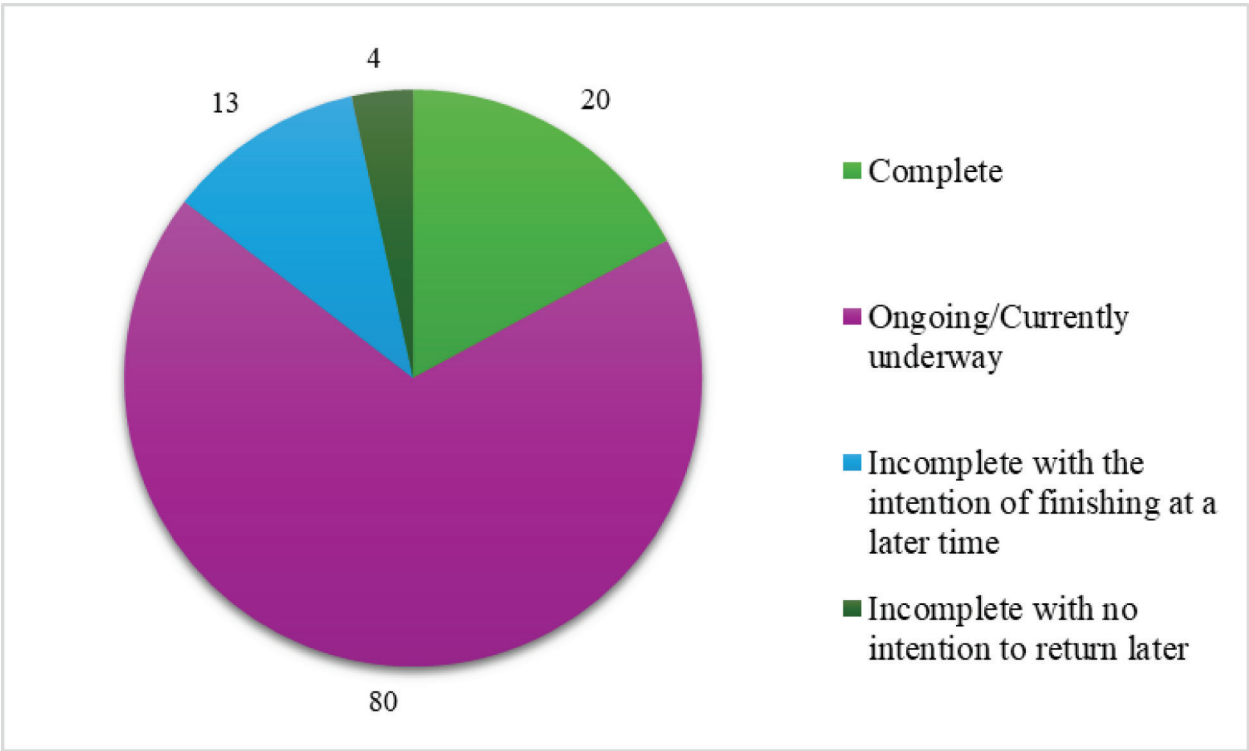
Figure 3. Recent projects status (*n* = 117).

Recent Project Continuation Status	Responses
Yes, the project is now a regular job duty or ongoing workflow	81
No, the project was completed and ceased	0
N/A	22

Figure 4. Survey question for project continuation status (*n* = 103). N/A, not applicable.

Experiences with Stakeholder Groups and Project Resource Allocations

Next, participants were questioned about their experiences with library stakeholder groups during their critical cataloging projects and changes in allocation of resources (figure 5). For this study, library stakeholder groups are defined as administrator or library leadership, colleagues or institutional staff, library users, and library technology support or information technology (IT) department. Respondents were asked to rate their overall experience with each group as support, ambivalence, reticence, or pushback with an option to select N/A.

Most participants reported receiving support from library administrators for their projects ($n = 112$, 69.64 percent), with some encountering ambivalence (19.64 percent), and fewer experiencing reticence (1.79 percent) or pushback (2.69 percent) on their work. Among colleagues and library staff ($n = 112$), a majority of respondents described experiencing support (68.75 percent), with some experiencing ambivalence (16.96 percent), and again a lower number meeting either reticence (3.57 percent) or pushback (2.69 percent). Respondents ($n = 111$) recounted experiencing either support (22.52 percent) or ambivalence (22.52 percent) from library users and patrons with a small number selecting either reticence or pushback (1.8 percent). With the IT department or technology support ($n = 112$), many participants reported receiving support (34.82 percent), some received pushback (16.96 percent), and a handful of respondents encountered reticence (4.46 percent) or pushback (0.89 percent). A χ^2 test of independence was conducted on the data collected to determine whether there are any correlations between the two variables—participant experience and library stakeholder group. The null hypothesis is that experience is independent from the group of institutional stakeholders. After an analysis of the data (degrees of freedom [df] = 12, χ^2 = 112.266, $p = 0$) and obtaining a p value of 0, the null hypothesis is rejected. Project experience is not independent from the stakeholder group (figure 6).
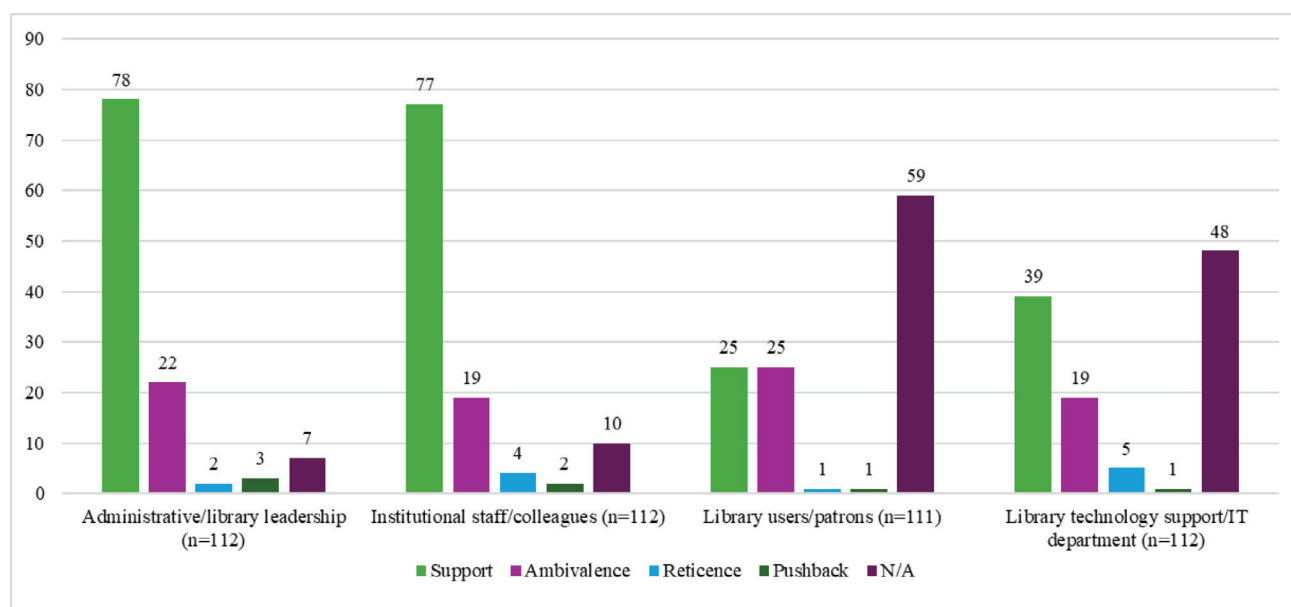
Figure 5. Participant experience during most recent critical cataloging project by stakeholder group. IT, information technology; N/A, not applicable.

Degrees of freedom (df)	12
χ^2	112.2655074
p value	0

Figure 6. Chi-square (χ^2) test results for survey question 6.

Survey participants were asked about any perceived changes in resource allocation experienced during their projects with the choice of selecting N/A. Resources in this context include work time, staffing or labor, and any sort of monetary funding, such as internal or external grants. Of the participants who answered ($n = 108$), most reported no change (73.15 percent) in work time during their most recent project, with others recounting an increase (9.26 percent), a decrease (11.11 percent), or N/A (6.48 percent). Regarding labor and staffing ($n = 111$), the majority of respondents answered no change (72.97 percent), with far fewer reporting an increase (7.21 percent), a decrease (11.71 percent), or N/A (8.11 percent). The majority of participants reported no change for the funding of their projects ($n = 89$, 89.89 percent), with a sizable number answering N/A (24.72 percent) and a small minority responding either experiencing an increase (6.74 percent) or decrease (3.37 percent) (figure 7). Another χ^2 test of independence was conducted to determine whether there were any correlations between resource types and changes in allocation. The null hypothesis is that the type of resource is independent from any changes in resource amount, and the original p value for the data ($p = 0.006$) was rounded up to 0.01 to determine significance. An analysis of the data (df = 6, $\chi^2 = 17.886$) yielded results to reject the null hypothesis (figure 8). The type of project resource is not independent from changes in funding allotment.
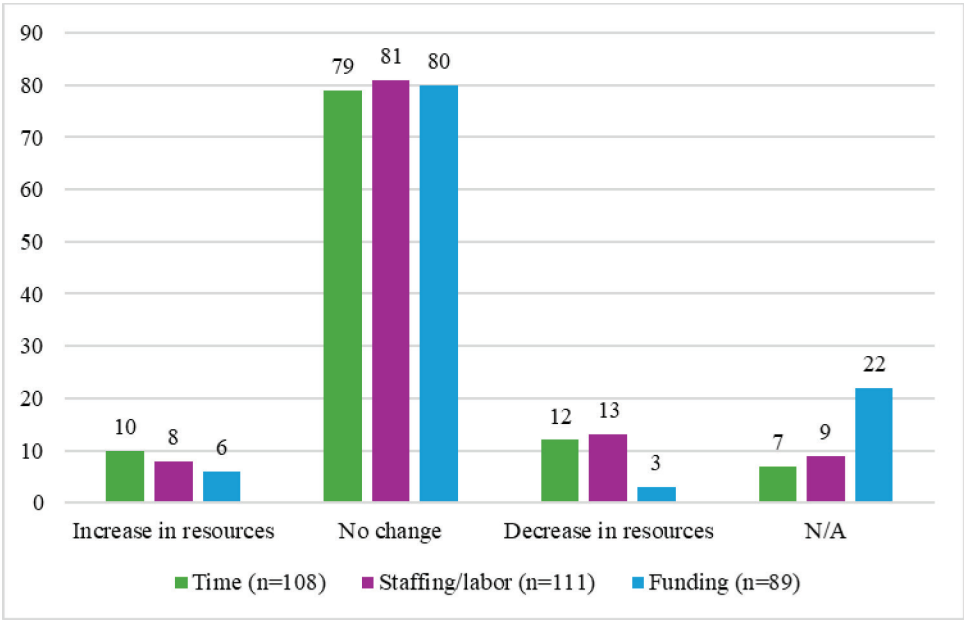
Figure 7. Changes in resource allocations during projects. N/A, not applicable.

Degrees of freedom (df)	6
χ^2	17.88634476
p value	0.006522591629

Figure 8. Chi-square (χ^2) test results for survey question 7.

Project Team Size and Affiliated Carnegie Classification

To conclude, survey participants were asked two questions about the size of their team for their most recent critical cataloging project plus the Carnegie Classification of their institution. The Carnegie Classification of Institutions of Higher Education is a common framework and system used by US colleges and universities to help classify institutions based on student body size and research output. Both questions were intended to find any institutional commonalities among survey participants.

Teams of two to four people (62.62 percent) and solo teams (20.56 percent) were both the most common among all of the respondents ($n = 107$). Larger team sizes of five to nine people (14.95 percent) or ten or more people (1.87 percent) were less common (figure 9).
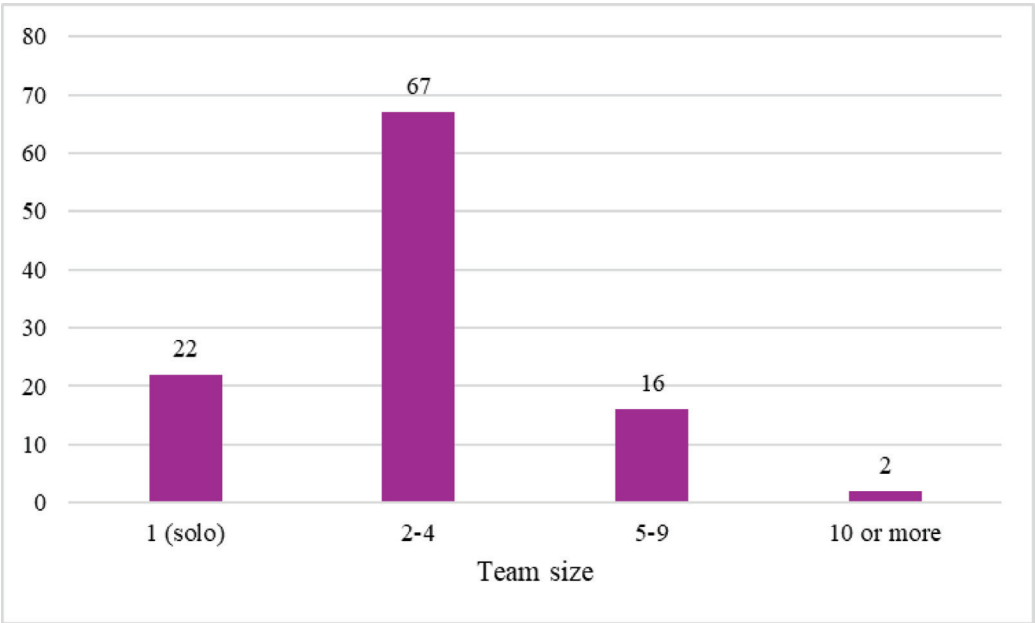
Figure 9. Project team size ($n = 107$).

Respondents also gave the Carnegie Classification of the institution where they worked on critical cataloging projects ($n = 107$). The majority of these projects occurred at R1 or Doctoral Universities, with very high research activity institutions providing 51.4 percent of participant responses. The remaining responses were spread among the different Carnegie Classification bands. The number of projects at R2 or Doctoral Universities with high research activity were 12.14 percent, and 6.54 percent

for D/PU institutions or Doctoral/Professional Universities. M1, M2, or M3 institutions (which are larger, medium, and small program Master's Colleges & Universities, respectively) contributed 14.29 percent of projects. Institutions classified as Baccalaureate Colleges with either an Arts & Sciences Focus or Diverse Fields focus and Baccalaureate/Associate's Colleges with either Mixed programs or Associate's Dominant programs produced the remaining projects at 15.89 percent (figure 10).
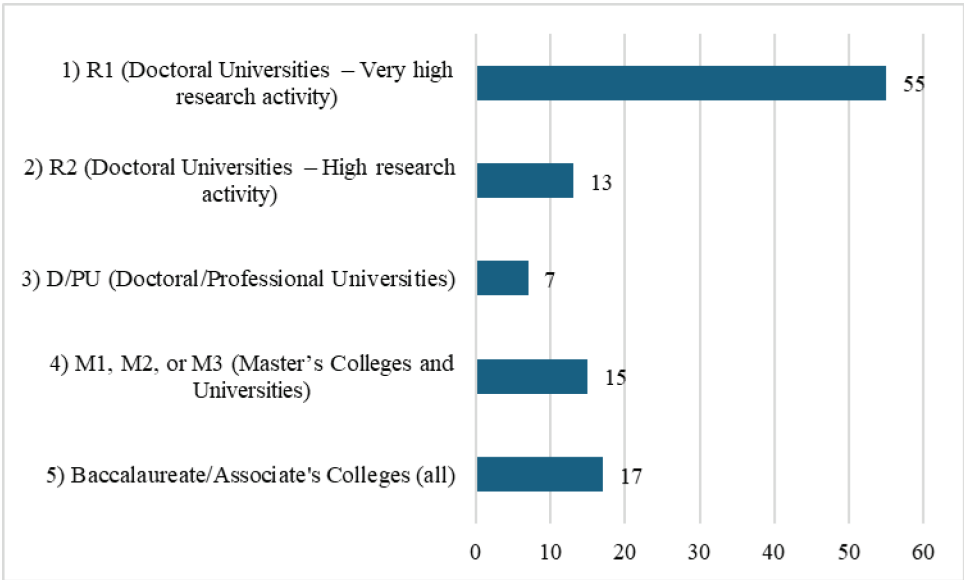
Figure 10. Type of higher education/academic institution by Carnegie Classification (*n* = 107).

Discussion

Based on the data collected from the pool of participants, this study can help illuminate the experiences catalogers and metadata specialists in academic libraries are having while working on critical and inclusive cataloging projects. Although any conclusions drawn can be extrapolated only to the respondents of this specific study, the researcher hopes that insights from participants' experiences can help explain the current state of critical cataloging work in the profession.

Remediation of subject headings and implementing alternative CVs are some of the most popular critical cataloging projects undertaken in recent years among study participants. For most of the respondents and their affiliated libraries, engagements with critical cataloging projects are recent endeavors launched within the past five years and initiated by larger R1 and R2 academic institutions. Team sizes of two to four people were also the most common for participants. Many participants reported having a project currently underway at the time the survey was distributed. Along with the follow-up question, participants indicate that work from completed critical cataloging projects often turns into regular job duties or becomes integrated into ongoing workflows. This illustrates active

engagement among these practitioners and their libraries, plus consideration for sustainability beyond the initial project.

The catalogers and metadata specialists surveyed regularly experienced support for their critical cataloging projects, particularly among both library leadership and colleagues. Few respondents reported reticence or pushback on their work among any of the stakeholder groups asked about in the study. In terms of perceived shifts to resource allocations for critical cataloging projects, most practitioners surveyed report that they and their teams are working without any changes in the amount of time, staffing, or additional funding. According to the data, it was rare for these practitioners to experience decreases or cuts in these areas and just as uncommon to get additional resources.

Conclusion and Future Directions

This research examined the experiences of catalogers and metadata specialists in academic libraries who have engaged in inclusive and critical cataloging projects within the past five years. From the sample of professionals surveyed, insights can be gained on which kinds of cataloging projects participants worked on and their perceptions of support for the work. Survey respondents were asked about the level of support received from different library stakeholder groups and any changes to the amount of project resources they experienced while working on it.

There are multiple possible future directions for research about this topic. One unexplored area of this study was to collect information about which geographic regions academic institutions are in within the United States to determine whether there are any trends or correlations that might emerge between engagement in critical cataloging work and library location. Another direction for future research would be to investigate the impact of recent US federal executive orders and state-level policies on removing EDI in higher education. Ongoing critical and inclusive cataloging work in academic libraries may be impacted because there is now increased oversight on colleges and universities complying with these new policy changes. Future environmental scans could go beyond academic libraries to other types, such as public libraries or K-12 school libraries, to learn what trends might emerge there. Future research can delve deeper into the experiences of the academic library catalogers and metadata specialists by adjusting the research methodology to allow for the collections of qualitative data for analysis. This would help to illuminate more about their experiences on these projects, as well as other emerging themes and trends.

The findings of this study can aid in improving critical and inclusive cataloging practices in academic libraries. Increased awareness of what other cataloging and metadata specialists are doing and working on helps not only the specialists within their niche but also professionals in other areas of the academic library. Work within a single organization or library has always been and still is interconnected and interdependent. Efforts to improve the library catalog and resource metadata for library users impact the whole organization. Additionally, there is potential for other cataloging and metadata specialists to

improve their own inclusive and critical cataloging work as a result of this study. These findings can also aid in efforts for practitioners to advocate for support in their own planned or ongoing projects.

The purpose of this study was to build a better understanding of critical and inclusive cataloging efforts within academic libraries in recent years. Although there have been ongoing efforts in inclusive and critical cataloging in US libraries spanning decades, the labor and projects that are produced from the renewed interest in these areas since 2020 are worthy of closer investigation. This environmental scan of critical cataloging projects is a first step in understanding the experiences and activities of catalogers and metadata specialists in academic libraries and archives engaging in the work to improve access to resources for users while showing them respect.

Appendix A

Survey Instrument

University of North Carolina at Greensboro
Information Sheet for Participation in Research

Protocol Title: Critical Cataloging and EDI Metadata Project in Academic Libraries

Principal Investigator: Tiffany Henry, UNC Greensboro University Libraries, PO Box 26170 Greensboro, NC 27402, tnhenry@uncg.edu, 336-256-8541

What is This All About?

I am inviting you to participate in this research study about the types of critical cataloging and Equity, Diversity, and Inclusion (EDI) focused projects that metadata specialists/catalogers at academic institutions in the United States undertake, their perceptions on project completion, and their project experiences. This research project will involve completing an online survey. Your participation will take 3 to 5 minutes. You can skip any questions you don't want to answer.

Are There any Risks?

The risks of participating in the survey phase of this study are minimal. You may feel discomfort thinking about negative work experience.

What About My Confidentiality?

I will do everything possible to make sure that your information is kept confidential, but absolute confidentiality cannot be guaranteed. All information obtained in this study will be maintained confidentially unless disclosure is required by law. I will not ask for any identifying information. Data collected from this study will be reported only in the aggregate.

Absolute confidentiality of data provided through the Internet cannot be guaranteed due to the limited protections of Internet access. Please be sure to close your browser when finished so no one will be able to see what you have been doing.

What if I Do not Want to be in This Research Study?

You do not have to be part of this project. This project is voluntary, and it is up to you to decide to participate in this research project. If you agree to participate at any time in this project, you may stop participating without penalty.

What if I have Questions?

You can ask Tiffany Henry at tnhenry@uncg.edu anything about the study. If you have concerns about how you have been treated in this study, contact the Office of Research Integrity Director at ori@uncg.edu.

If you wish, you can print, take a screenshot of this consent page for your records, or download a copy of this form here: Study Information for Research Participation.

By selecting "agree" you are consenting to participate in the study:

☐ Agree

☐ Disagree (exit survey)

Question 1:

Do you currently work or have you recently worked in an academic library as a cataloging/metadata specialist? [Note: For the purposes of this study, **Cataloging/Metadata specialists** are defined as having more than 50% of work time allotted to performing descriptive cataloging and metadata work regardless of formal job title.]

☐ Yes

☐ No (exit survey)

Question 2:

In the past 5 years, have you worked on any of the following projects for your library/institution? [Note: For the purposes of this study, **projects** are defined as discrete initiatives with planned goals and endpoints, typically separate from regularly assigned ongoing work duties]

	Yes	No
Implemented alternative controlled vocabularies for subject headings and/or genre terms	☐	☐
Changed or remediated assigned classification numbers	☐	☐
Changed or remediated controlled vocabularies or subject headings already in use	☐	☐
Updated/altered descriptions of resources	☐	☐
Created/implemented of harmful language statement	☐	☐
Changed/Edited name authority records	☐	☐

Question 3:

How long has your library/institution been engaged in critical cataloging/EDI-focused metadata projects?

☐ 0-1 years

☐ 2-3 years

☐ 4-5 years

☐ 5-9 years

☐ 10 or more years

Question 4:

Thinking back to the most recent critical cataloging/EDI-focused metadata project you or your team worked on, what is the status of this project?

☐ Complete

☐ Ongoing/Currently underway

☐ Incomplete with the intention of finishing at a later time

☐ Incomplete with no intention to return later

Question 5:

For the most recently completed critical cataloging/EDI focused metadata project, did the library/institution plan to continue with the project?

☐ Yes, the project is now a regular job duty or ongoing workflow

☐ No, the project was completed and ceased

☐ N/A

Question 6:

Thinking back to the most recent critical cataloging/EDI-focused metadata project, did you or your team experience any of the following?

	Support	Ambivalence	Reticence	Pushback	N/A
Administrative/library leadership	☐	☐	☐	☐	☐
Institutional staff/colleagues	☐	☐	☐	☐	☐
Library users/patrons	☐	☐	☐	☐	☐
Library technology support/ IT department	☐	☐	☐	☐	☐

Question 7:

Did you or your team experience changes to the amount of resources available during the most recent critical cataloging/EDI-focused metadata project?

	Increase in resources	No change	Decrease in resources	N/A
Time	☐	☐	☐	☐
Staffing/labor	☐	☐	☐	☐
Funding (e.g. internal or external grants, funding for new software, etc.)	☐	☐	☐	☐

Question 8:

How many people at your institution worked on the most recent critical cataloging/EDI-focused metadata project?

☐ 1 (solo)

☐ 2-4

☐ 5-10

☐ 10+

Question 9:

Select the type of higher education/academic institution at which the project was worked on?:

☐ R1: Doctoral Universities – Very high research activity

☐ R2: Doctoral Universities – High research activity

☐ D/PU: Doctoral/Professional Universities

☐ M1: Master's Colleges and Universities – Larger programs

☐ M2: Master's Colleges and Universities – Medium programs

☐ M3: Master's Colleges and Universities – Small programs

☐ Baccalaureate Colleges - Arts & Sciences Focus OR Diverse Fields

☐ Baccalaureate/Associate's Colleges - Mixed Baccalaureate/Associate's College OR Associate's Dominant

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Thank you for completing this survey! Your effort is appreciated, and your responses have been recorded.

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Streamlining Invoice Management in Academic Libraries
A Case Study Using ClickUp
Devon Ellixson and Russell Michalak

Managing invoices and contracts remains a persistent challenge in academic libraries, especially in lean-staffed environments where decentralized workflows increase the risk of errors and delays. This case study documents how a small, master's-level institution transitioned from fragmented manual processes and a partially customized Notion workspace to ClickUp, a centralized project management platform. Unlike Notion, which required extensive customization and frequent retraining of student workers, ClickUp offered structured, out-of-the-box workflows that automated routine tasks, standardized documentation, and improved vendor communication with minimal onboarding. The shift reduced invoice processing time by 50 percent and eliminated duplicate payments, strengthening vendor trust and operational accountability. By comparing ClickUp with manual spreadsheets, integrated library system modules, and electronic resource management tools, the study highlights trade-offs between flexibility, scalability, and staff capacity. Practical recommendations are provided for libraries—particularly underresourced institutions—seeking low-overhead digital solutions that enhance efficiency, accuracy, and sustainability in financial workflows.

Introduction

Academic libraries—regardless of size or vendor base—often struggle with invoice processing when workflows are decentralized and rely on manual coordination across multiple systems. At our library, this challenge was especially pronounced. Documents moved through email threads, spreadsheets, vendor portals, and disconnected institutional units such as the college's central business office. Prior to adopting ClickUp, we experimented with Notion, a flexible all-in-one workspace, to track invoices, contracts, approvals, and helpdesk tickets. Yet despite these efforts, both physical and digital materials continued to slip through the cracks. Invoices arrived through unpredictable channels—the campus helpdesk, SpringShare's Customer Relationship Management (CRM) software, individual inboxes, and even postal mail. Some were addressed to the business office, others to the receptionist, current librarians, librarians who had moved on, a retired librarian, a deceased librarian, and even student worker interns—wherever vendors believed they might get a response.

The absence of a unified intake process and consistent documentation workflow for invoices and contracts led to delayed payments, miscommunications, and administrative bottlenecks. These inefficiencies not only strained vendor relationships but also slowed progress on student success initiatives, artificial intelligence (AI) literacy efforts, and faculty development programs—areas that depend on timely collaboration and relationship-building with key stakeholders.

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This case study is set at a small, master's-level institution with approximately 1,500 students and an emerging Hispanic-Serving Institution (HSI) designation. The library operates with one full-time librarian supported by student workers and occasional interns. For context about the staffing, management, and workflows of the library described in this study, as documented in papers by Monica Rysavy and Russell Michalak, pandemic-era budget cuts, attrition, and hiring freezes left operations fragile, making routine processes highly vulnerable to disruption without integrated workflows in project management software.[1] In this lean environment, student assistants often assumed responsibilities typically reserved for professional staff, making sustainability and consistency a constant challenge.

In this paper, we describe our library's transition from a fragmented, manual invoice system to a streamlined, automated workflow using ClickUp. It examines the challenges that prompted change, the decision-making and implementation process, and the measurable outcomes. By sharing this experience, we aim to provide a roadmap for other academic libraries—particularly small or underresourced institutions—seeking to modernize financial workflows, reduce errors, and strengthen cross-departmental coordination through agile, technology-enabled solutions. This case study focuses specifically on the invoicing workflow while noting that the library has gradually adopted ClickUp for additional operational areas (e.g., approvals and helpdesk coordination). The scope is limited to invoicing in order for implementation choices, outcomes, and lessons learned to be presented in depth.

Literature Review

The literature on project management and invoice workflows in academic libraries underscores the critical role of adopting modern technologies to address inefficiencies and enhance operational capabilities. Kayla Kipps and Allison Jones explore cloud-based tools like Trello and Google Drive, emphasizing their collaborative and scalable features in managing collection workflows.[2] This complements Robert Alan's earlier identification of the limitations in manual workflows, particularly the lack of centralization, which often results in errors and inefficiencies.

Managing invoices and vendor relationships remains a complex and time-intensive process for academic libraries. Manual tracking methods, as highlighted by Alan, often lead to delayed payments, errors, and strained vendor relationships.[3] Patrick Kelsey, along with Kipps and Jones, further elaborates on the strain these inefficiencies place on library staff, disrupting workflows and the library's ability to meet community needs.[4] William Midgley and Kavita Mundle build on these findings, showcasing the scalability and error reduction achieved through automated systems like Alma.[5] Martha Stoddard, Ben Gillis, and Peggy Cohn demonstrate that applying Agile principles in libraries fosters cross-functional teamwork, transparency, and adaptability, directly addressing inefficiencies comparable with those found in invoice and vendor management workflows.[6]

The evolution of tools like ClickUp reflects broader trends in project management methodologies, particularly the transition from rigid approaches like the waterfall model to more dynamic frameworks such as Agile. Joy Perrin argues that libraries benefit from Agile principles, which prioritize adaptability

and collaboration, aligning well with the frequent shifts in user needs.[7] Similarly, Samantha Schmehl Hines emphasizes the distinction between projects and routine tasks, advocating for a systems-thinking approach to manage library initiatives effectively.[8] These insights align with Joy Perrins's findings on the utility of ClickUp, a tool that integrates Kanban principles to visualize workflows and optimize resource allocation.[9]

Communication also emerges as a critical component of successful project management in libraries. Robert Alan et al. discuss the implementation of web-based tracking systems such as Pennsylvania State University's ERLIC2, which centralizes information related to access, authentication, licensing, and issue resolution.[10] These systems, along with tools like Google Drive, enhance transparency and team collaboration, as highlighted by Kipps and Jones.[11] Kristen Wilson further underscores the importance of integrated communication tools in improving cross-departmental workflows.[12] Echoing Wilson's emphasis on integrated communication, Stoddard, Gillis, and Cohn found that Agile tools such as Kanban boards and iterative stakeholder reviews enhanced transparency and cross-departmental collaboration.[13]

Visualization tools such as Tableau Public, discussed by Kipps and Jones, and features such as Kanban boards in ClickUp provide libraries with the ability to identify bottlenecks and analyze trends.[14] These tools align with Kelsey's findings that structured workflows enhance operational consistency and resource management.[15] By visualizing processes, libraries can improve decision-making and ensure timely task completion.

The implications of these advancements extend beyond operational efficiencies. Delays in invoice processing or payment errors can disrupt access to essential resources, directly affecting students and faculty. Alan and Barbers et al. highlight the critical role of data-driven decision-making in maintaining uninterrupted access to resources, a sentiment echoed in Kipps and Jones's advocacy for cloud tools that foster accessibility and transparency.[16]

Integrating change management principles with project management tools like ClickUp in academic library workflows reflects the convergence of modern methodologies with technological innovation. These tools enable libraries to address inefficiencies, streamline communication, and enhance scalability. As Hines and Perrin suggest, applying Agile principles and visualization techniques ensures libraries remain adaptable and focused on their mission to support evolving user needs.[17] The collective insights of Alan et al., Wilson, and Jones and Kipps illustrate the transformative potential of project management software, offering a pathway for libraries to achieve sustainable operational excellence.[18] In line with Hines's systems-thinking approach, Stoddard et al. stress that adopting Agile requires cultural change within libraries, underscoring that tools such as ClickUp succeed when paired with shifts toward resilience, adaptability, and iterative learning.[19]

Challenges Before Adopting the Project Management Software, ClickUp

The impetus for changing our invoice and contract processes from system to system—finally landing on ClickUp—was the accumulation of persistent, compounding challenges that hindered our daily operations.

Before adopting automated workflow solutions in Notion and later ClickUp, our library relied on a patchwork of spreadsheets and Microsoft SharePoint to manage invoices for electronic resources, print materials, vendor contracts, and operational issues. This decentralized approach created recurring problems for a lean staff and placed the entire administrative burden on the library director. In such a small-staff environment, the lack of centralization not only undermined collaboration but also diluted accountability and slowed problem resolution.

Manual entry into multiple spreadsheets added another layer of inefficiency. Although staff generally entered data accurately, the lack of standardized templates and fragmented reporting introduced errors. Double payments, overlooked invoices, and incorrect amounts occurred, and scattered documentation across emails and folders forced time-consuming cross-referencing. These inefficiencies disrupted budget planning and hindered real-time assessment of financial obligations.

Frequent policy changes and shifting invoice submission forms compounded the confusion, often introduced without clear communication with staff. High turnover among student workers further strained the system; each new hire had to be trained on a complex, inconsistent workflow. This retraining diverted time from more valuable responsibilities and created ongoing inefficiencies, as learning new systems slowed progress. Even after training, manual spreadsheet entry remained error-prone and absorbed hours that could have been better dedicated to resource management, user services, or strategic planning.

As the library's vendor base and collections expanded—from about 92,000 full-text items with eight vendors in 2010 to nearly one million items with forty-two vendors at the time of writing—risks of error multiplied, particularly during peak invoicing periods such as summer, when student support was minimal. With manual workflows consuming so much time, staff were diverted from core responsibilities.

Compounding the issue, the library's integrated library systems (ILSs; SirsiDynix Symphony through 2017, now KOHA) offered financial management features that remained underutilized. This was not due to system limitations but to internal constraints: a skeleton staff, limited permissions, and no dedicated administrative expertise. As a result, the ILS's potential to streamline invoice management remained untapped.

Together, these challenges underscored the urgent need for a centralized, scalable workflow. To address this, the library sought a project management platform capable of real-time task tracking, automation, and integrated documentation—ultimately finding a sustainable solution in ClickUp.

Comparing and Choosing Tools for Library Operations

When examining potential solutions for managing invoices and contracts, the library considered a range of tools: manual spreadsheets, collaborative platforms like Notion, project management tools like ClickUp, and specialized systems such as EBSCO's Electronic Resource Management (ERM) and Koha's

ILS with an ERM module. Each option offered unique strengths and limitations, revealing clear trade-offs between flexibility, automation, and specialization, as detailed in table 1.

Manual spreadsheets were the starting point. They are familiar, low cost, and accessible, but lack automation and structure. Data entry, reconciliation, and reporting require manual work.

Notion offered more organization and flexibility than spreadsheets, particularly for documentation, note-taking, and linked databases. Its workflows required significant customization, however, and automation was minimal. The learning curve was steep for student workers, and they required frequent retraining. Reporting capabilities were also limited, in that we had to export and reformat the data. Although helpful for knowledge sharing and small projects, Notion did not scale well to meet the demands of financial and operational management.

ClickUp represented a significant improvement, combining usability with automation. Out-of-the-box templates reduced setup time, while built-in task assignments, reminders, and workflow routing centralized invoice management. Its dashboards provided real-time financial and operational reporting, making accountability clearer and more consistent. ClickUp's intuitive design also reduced the training burden for student workers and new staff, a key benefit in a high-turnover environment. As the library's collections and vendor relationships grew in number and complexity, ClickUp scaled effectively, supporting both efficiency and collaboration.

EBSCO ERM was designed specifically for managing the full life cycle of electronic resources. Built on the open-source FOLIO platform, it integrated agreements, licenses, invoices, finances, and holdings into a single environment. The system's automation extended beyond internal workflows to automatically update catalogs, discovery tools, and link resolvers, ensuring users had immediate access to resources. EBSCO ERM excelled in scalability and depth of functionality, although it requires considerable administrative expertise and staffing to fully realize its potential.

Koha ILS with ERM offered another specialized alternative. As a full-featured ILS with an ERM module, Koha provided unified management of both physical and electronic resources. The ERM module supported agreements, licenses, usage reports, and holdings, while the broader ILS framework supported acquisitions, cataloging, and circulation. This integration reduced duplication of effort and allowed staff to manage workflows in a single system. Like EBSCO ERM, however, Koha required ongoing administrative investment and technical capacity that proved difficult for a smaller institution with a limited staff.

Taken together, these comparisons show the progression from general-purpose tools to specialized systems. Spreadsheets and Notion offer alternative, nonstandard, low-cost fixes but lack scalability and efficiency. EBSCO ERM and Koha deliver comprehensive, library-specific functionality but demand staffing and expertise beyond the capacity of a small library. ClickUp emerged as the best fit for the library's needs, providing a balance of automation, scalability, and usability that streamlined workflows while minimizing training and administrative overhead.

Table 1. Comparison of Notion and ClickUp for Library Operations

Feature	Spreadsheets	Notion	ClickUp	EBSCO ERM	Koha ILS + ERM Module
Primary strengths	Simple, widely available, and familiar to most staff; good for basic recordkeeping	Flexible documentation, collaborative note-taking, and linked databases	Structured task and project management with automation and dashboards	Purpose-built for managing the life cycle of electronic resources: agreements, licenses, orders, invoices, and holdings	Full ILS + built-in ERM: manage both electronic and physical resources in one platform
Automation	Limited; all data entry, updates, and reminders must be done manually	Minimal; relies on third-party integrations and manual updates	Built-in; supports automatic task assignment, reminders, and workflow routing	High; integrates with EBSCO Knowledge Base to update link resolvers, catalogs, discovery, and access rights automatically	Significant—ERM automates tracking (agreements, licenses, usage reports), e-holdings integrated; ILS functions auto catalog too
Workflow support	Highly manual, prone to errors, no built-in task tracking; requires constant oversight	Adaptable but requires significant customization; steep learning curve for short-term staff	Out-of-the-box templates reduce setup; intuitive training for rotating student workers	Comprehensive life cycle management; includes apps for licenses, agreements, finances, tasks, and e-holdings	ERM module supports agreements, licenses, e-holdings, and usage workflows inside Koha; familiar to staff managing both sides
Reporting	Time-consuming; requires manual compiling, reformatting, and cross-referencing	Basic; exporting and reformatting required for usage or financial summaries	Customizable dashboards provide real-time financial and operational reporting	Built-in dashboards and reporting across agreements, licenses, finances, and usage; designed for library workflows	Custom reporting—including usage statistics (like COUNTER), agreements, holdings within Koha
Scalability	Poor; error-prone and unsustainable as volume or vendor complexity grows	Limited for growing invoice volume or multistep approvals	Scales effectively with increasing invoice complexity and collaborative needs	Highly scalable; supports large collections and multiple vendors with integrated workflows across the library system; built-in dashboards and reporting across agreements, licenses, finances, and usage; designed for library workflows	Scales well across physical and electronic collections, ideal for growing, diverse library needs
Best fit	Very small operations with low volume and limited vendors	Documentation, knowledge sharing, small-scale projects	Operational workflows requiring accountability, reporting, efficiency, and training	Libraries managing complex e-resources life cycles, needing integration with catalogs, discovery, and user access systems	Libraries using a unified ILS who want integrated e-resource management within a single system

Transitioning to an Automated Workflow

Implementing ClickUp as the centralized platform for invoices consolidated the tasks of contract review, invoice verification, and check-request routing into a single, auditable workflow. By consolidating all invoice-related tasks into a single system, the library team eliminated long-standing inefficiencies, reduced errors, and created a scalable process for handling payments. This shift provided greater clarity, accountability, and timeliness in invoice management, ensuring uninterrupted access to essential resources.

Previously, invoices were tracked through emails, spreadsheets, and paper files—leading to disorganization, delays, and financial discrepancies. Although Notion provided some structure, its limitations reinforced the need for a more sustainable solution. ClickUp centralized tasks, assigned responsibilities, and provided real-time updates within a single system.

Task Decomposition and Workflow Design

A crucial step in implementation was splitting invoice management into smaller, actionable phases:

1. Contract—receive, sign, send
2. Invoice—receive, create, send
3. Payment—create, sign, submit

These phases were mapped into ClickUp tasks, ensuring each step was completed before moving forward. This structured approach minimized bottlenecks and reduced errors (see table 2).

Table 2. Breaking Down the Invoice Management Process

Contract	Invoice	Check Request
Receive vendor contract	Receive vendor invoice	Create check request form
Review vendor agreement terms	Verify invoice terms and accuracy	Attach required documentation
Secure internal approvals and signatures	Create invoice record in ClickUp	Route for signature
Return signed contract to vendor	Forward/countersign if needed	Submit to business office
File and update documentation	Update ClickUp task and documentation	Track status in ClickUp
	Send to business office	

As depicted in figure 1, this workflow begins when the library director receives a contract from a vendor and reviews it before sending it to the Vice President of Planning for approval. Once signed, the contract is returned to the vendor, who then provides a countersigned version. After the vendor issues an invoice, the library director passes it along to the intern, who prints two copies and prepares a check request form. The completed form and invoice copies are submitted to the central business office, while the intern simultaneously logs and tracks progress in ClickUp. From there, ClickUp generates reports and dashboards that summarize invoice activity by vendor, fiscal period, or overdue status. Finally, the business office and institutional leadership review these data visualizations, ensuring financial accountability and operational transparency across the workflow.

Figure 1. Check request workflow chart.

```
        ┌──────────────────────────────────────┐
        │  Library director receives contract  │
        │             from vendor              │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │    Library director reviews contract │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │      VP of Planning signs contract   │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │  Library director returns signed     │
        │        contract to vendor            │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │     Vendor countersigns contract     │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │  Vendor sends invoice to library     │
        │             director                 │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │  Intern receives invoice from        │
        │         library director             │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │  Intern prints two copies of invoice │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │  Intern fills out check request      │
        │        form (~10 minutes)            │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │  Intern submits check request form   │
        │  + copies of invoice to Central      │
        │         Business Office              │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │   Intern tracks progress on ClickUp  │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │  Generate reports & dashboards (by   │
        │  vendor, quarter, overdue tasks)     │
        └──────────────────────────────────────┘
                         │
                         ▼
        ┌──────────────────────────────────────┐
        │  Business Office & leadership        │
        │         review data                  │
        └──────────────────────────────────────┘
```

Figure 1. Check request workflow chart.

Visualization and Bottleneck Resolution

ClickUp's visualization tools—including mind maps and workflow charts—provided a clear overview of the full invoicing process. Visualizing task dependencies helped identify recurring issues, such as delays in check request approval. Using these tools in weekly review meetings, the team was able to make real-time adjustments, improving overall efficiency (see figure 2).
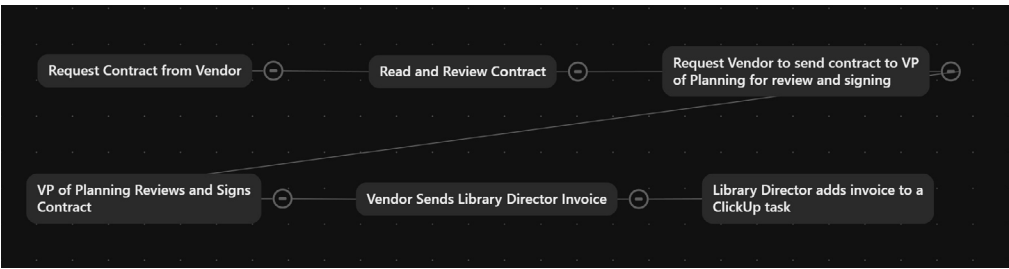
Figure 2. Electronic Resources Workflow mind map.

Customization and Role Assignments

Customized task statuses—such as Invoice Received, Check Request Submitted, Awaiting Payment, and Completed—created a shared vocabulary that clarified progress and reinforced accountability across all stages of the invoice management process. These labels not only provided real-time visibility into the status of each task but also established a consistent framework that both professional staff and rotating student workers could quickly understand. Role assignments further complemented this clarity: Interns were tasked with processing check requests, while the library director reviewed and approved them before submission to the business office. This structured delegation eliminated confusion over responsibilities and ensured that every action was documented and traceable, as shown in figures 3 and 4.

ClickUp's customizable status settings allowed the library to align its workflows precisely with the contract and invoice life cycle. As illustrated in the Electronic Resources Workflow, statuses were tailored to reflect sequential phases: early-stage actions, such as TO DO and EMAIL VENDOR; intermediate checkpoints, such as Invoice Received, Contract Review, and Check Request; and completion markers, including Contract Signed and Check Request Paid (see figure 3). By mapping the entire process in this way, the library created a transparent chain of responsibility that minimized ambiguities and reduced risks of delays.
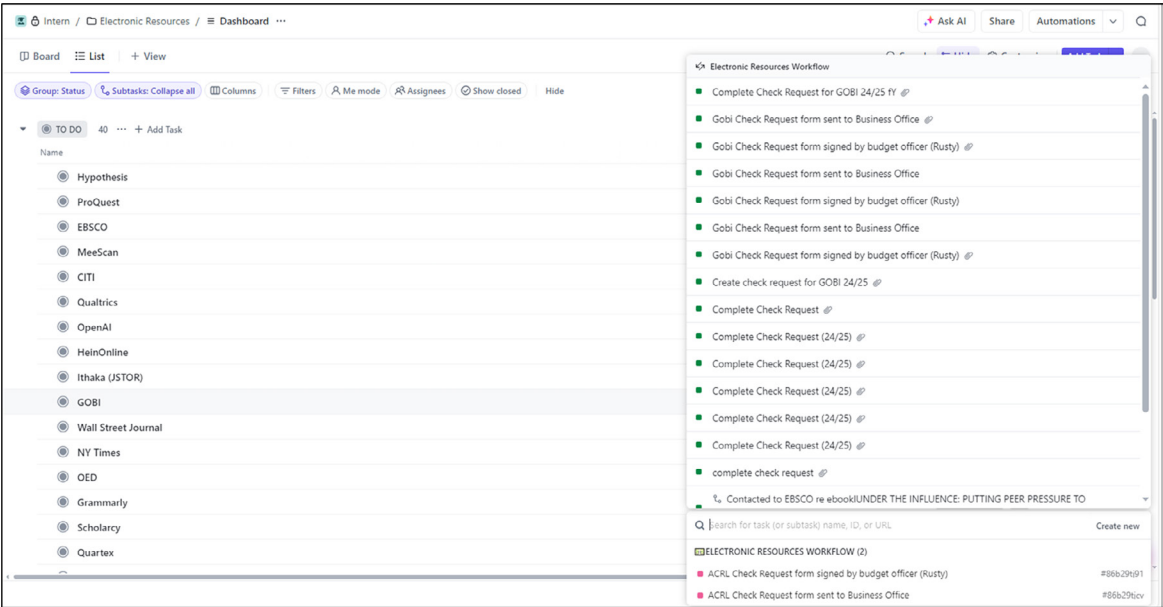

Figure 3. Dashboard of vendors and relationships to tasks with ClickUp.

This granular breakdown also supported real-time monitoring. For example, once a contract was reviewed and signed by the Vice President of Planning, the next step was triggered automatically when the vendor returned a countersigned copy. The invoice was then sent to the library director, logged into ClickUp, and assigned a new status that launched the subsequent workflow. Each handoff—from contract to invoice to payment—was documented within the platform, reducing the informal, ad hoc communication that previously led to confusion or misplaced documentation. Figures 3 and 4 demonstrate how these customized statuses and vendor dashboards provided both microlevel detail on task progress and macrolevel visibility into the broader invoice life cycle.

Importantly, this model of customization and delegation is scalable. Although this case study focuses on invoice management, the same approach—defining task statuses that mirror real processes, assigning roles that match staff capacity, and using dashboards for oversight—can be applied to other library functions, such as acquisitions, renewals, and even instructional technology management. By tailoring statuses and roles to specific workflows, libraries of different sizes and staffing models can adapt ClickUp (or comparable project management platforms) to support their unique operational needs, ensuring both consistency and adaptability over time.

The Electronic Resources Workflow in ClickUp uses a series of customized statuses to track every stage of invoice and contract management. These include:

- **To Do**—initial placeholder for new tasks
- **Email Vendor**—prompts communication with the vendor
- **Follow Up**—indicates pending responses that require staff action
- **Waiting for Response**—flags when the library is awaiting vendor feedback
- **Respond**—designates that a reply to the vendor is required
- **Invoice Requested**—records that an invoice has been requested from a vendor
- **Waiting for Invoice**—identifies tasks paused until the vendor provides an invoice
- **Invoice Received**—confirms receipt of the vendor's invoice
- **Need to Pay Invoice**—signals that payment must be initiated
- **Invoice Paid**—marks the invoice as fully processed and paid
- **Contract Requested**—records that a contract has been requested
- **Contract Received**—indicates that the vendor has submitted the contract
- **Contract Signed**—confirms execution of the contract
- **Renewal Notification**—highlights upcoming renewal deadlines
- **Check Request**—documents that a check request form has been created
- **Check Request Review**—shows that the check request is under review before submission

Color coding is applied to reinforce meaning:

- **Red** for delays or pending responses (*Waiting for Response, Invoice Requested, Renewal Notification*)
- **Green** for contract-related progress (*Contract Requested, Contract Received, Contract Signed*)
- **Blue** for payment stages (*Check Request, Check Request Review*)

Together, these statuses create a comprehensive, step-by-step framework that ensures tasks move through the life cycle of ERM with clarity and accountability (figure 4).
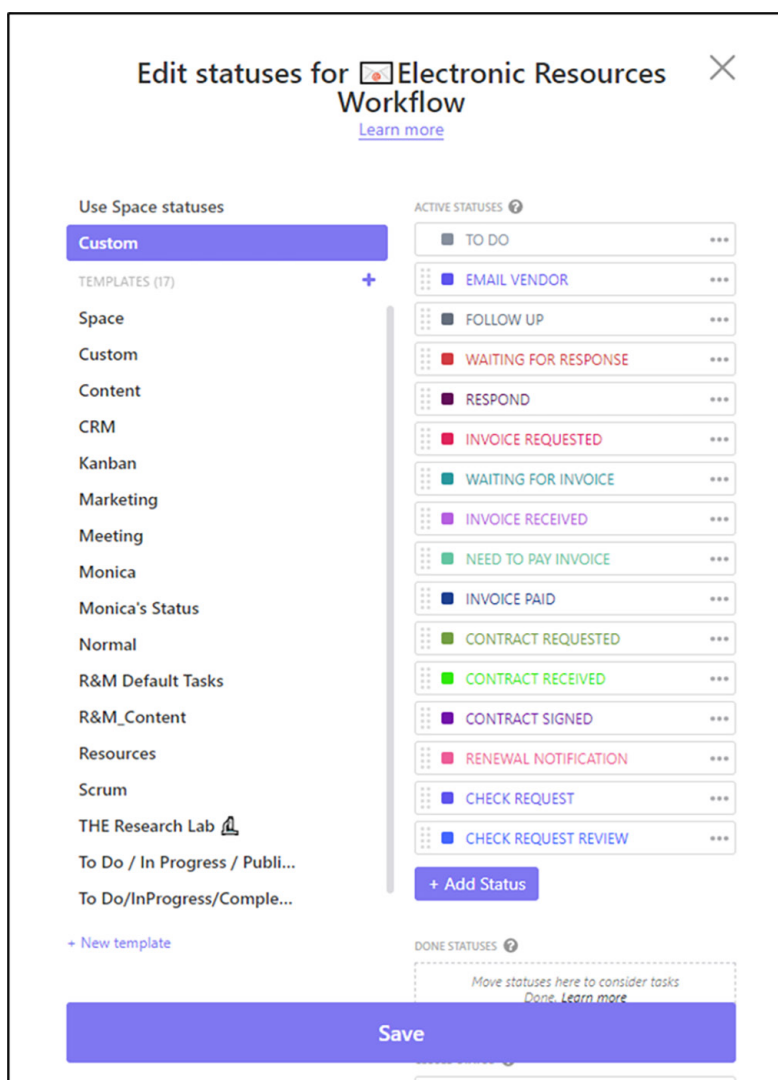
Figure 4. List of task statuses in the Electronic Resources Task within ClickUp.

Centralization and Transparency

Consolidating workflows within ClickUp replaced fragmented tracking with a single source of information on contracts and invoices. Vendor dashboards, such as those for GOBI, displayed all associated tasks, histories, and statuses at a glance—making it easier to search. Integrations with Google Drive and Excel allowed contracts, invoices, and payment confirmations to be attached directly to tasks, reducing misplaced data and streamlining documentation (figure 5). This reduced the need to identify past invoices by year in multiple Excel sheets or in different types of ERMs when we received reminders to pay the bill via email.

Figure 5. Completed tasks in the Electronic Resources Workflow within ClickUp.

Automation and Efficiency Gains

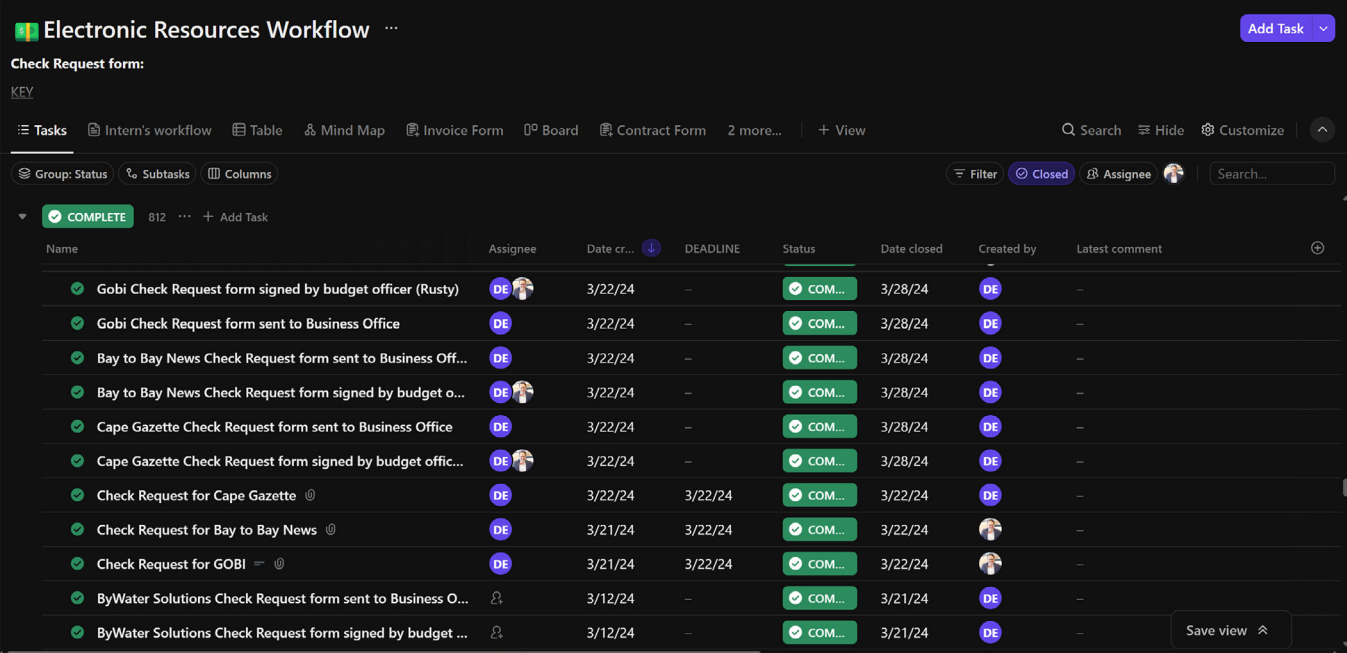One of ClickUp's most transformative features was automation. Repetitive tasks such as updating statuses, sending reminders, or triggering next steps were automated, reducing administrative burden and human error. For example, marking an invoice as *Submitted* automatically advanced it to *Awaiting Payment* and notified the responsible staff member, the library intern. These efficiencies allowed staff to focus on resource management and patron services instead of routine administration.

Reporting, Analytics, and Planning

ClickUp's reporting and analytics tools became a central component of our invoice management transformation, moving the library beyond basic task tracking into proactive financial planning. Unlike prior spreadsheets or Notion workflows, ClickUp provided both out-of-the-box dashboards and customizable reporting options. Out-of-the-box templates such as workload charts and activity timelines offered immediate visibility into task assignments, overdue invoices, and overall processing volume. In addition, we built custom dashboards tailored to library operations that included filters by vendor, fiscal period, resource category, time spent on tasks, and contract or invoice status. These refinements allowed us to analyze costs across categories—print, electronic, open access, and educational technologies—while also tracking how much time staff and interns dedicated to each phase of the invoicing workflow. Such insights were not possible in earlier systems.

This combination of standardized templates and custom reports supported both daily operations and long-term planning. On a day-to-day basis, ClickUp reports allowed staff to monitor overdue invoices,

identify bottlenecks in approval chains, and ensure accountability through transparent task histories. Over time, analytics revealed seasonal patterns—for example, spikes in renewals during the summer when student workers were unavailable. Recognizing these cycles enabled us to adjust staffing schedules, plan training in advance, and reduce end-of-year bottlenecks. Similarly, dashboards summarizing vendor obligations and contract statuses became central in budget meetings with the business office, providing real-time visibility into payments, outstanding obligations, and upcoming renewals.

Reporting also strengthened the library's negotiating position with vendors. Historical spending reports, paired with contract status dashboards, allowed us to demonstrate cost escalations, usage trends, and payment histories. This evidence-based approach informed renewal decisions and supported requests for more favorable terms. Beyond vendor relations, reports provided the central business office with standardized, real-time data, reducing misunderstandings and reinforcing institutional trust in the library's financial workflows.

Finally, reporting extended ClickUp's value beyond invoice tracking to a strategic planning framework. Workload charts not only balanced invoice-processing tasks among interns but also documented staff capacity constraints, which supported requests for additional hours for student workers. Time-tracking data highlighted the administrative burden of repetitive tasks, helping justify automation and staff development initiatives. Custom contract-status reports gave administrators and auditors a clear picture of compliance and renewal pipelines, strengthening accountability and transparency across departments.

In short, ClickUp's analytics transformed financial workflows from reactive to data-driven. By combining out-of-the-box tools with locally designed dashboards, the library gained actionable insights into staff capacity, vendor relationships, and budget cycles. This shift turned ClickUp into more than a project management tool: It became an evidence-based decision-making platform, aligning library operations with institutional priorities and addressing inefficiencies that had long strained a lean staffing model.

In practice, we rely on a mix of out-of-the-box reports (Workload, Activity, and Due Soon summaries) and custom dashboards (Vendor Obligations by Fiscal Period, Invoices by Status and Aging, Renewal Calendar, and Time on Verification vs. Routing). These views informed three planning decisions: (1) shifting student-worker hours into the June–August renewal spike; (2) prescheduling signature windows with finance leadership during peak months; and (3) using year-over-year vendor spend alongside usage summaries in negotiations to curb price escalations. Because the same dashboards feed both operations and meetings with the business office, we reduced back-and-forth reconciliation and improved forecast accuracy.

Security and Compliance

Ensuring the security and compliance of financial workflows was a critical consideration when implementing ClickUp. Because invoice management involves sensitive financial data, vendor agreements, and institutional records, it was essential to establish safeguards that protected both the integrity of the data and the library's compliance with institutional and external requirements.

Quarterly Security Reviews

The library instituted quarterly reviews to monitor and reinforce compliance. These reviews included:

- Role-based permission audits to confirm that only authorized staff—such as the library director and designated interns—could access sensitive financial tasks and attachments: Permissions were aligned with the principle of least privilege, ensuring that staff had access only to the tasks necessary for their role.
- Compliance checks with institutional policies, including data retention standards, acceptable use guidelines, and vendor contract stipulations: Any updates in institutional information technology (IT) or financial policies were reflected in ClickUp workflows to maintain alignment.
- Integration reviews with SharePoint, verifying that financial records and contracts stored outside of ClickUp were properly linked, secure, and accessible only to authorized users: These reviews also ensured that sensitive files were not inadvertently stored in ClickUp when institutional policy required them to be maintained within SharePoint's controlled environment.

Audit Trails and Accountability

ClickUp's built-in audit trails added another layer of compliance. Each action—such as uploading an invoice, changing a task status, or approving a check request—was automatically logged with a time stamp and the responsible staff member. These logs not only supported accountability within the library but also provided the central finance office with a verifiable chain of custody for financial transactions. In cases of vendor disputes or internal audits, the ability to produce complete documentation of every step in the invoice life cycle proved invaluable.

Data Privacy and Vendor Agreements

ClickUp's role in invoice management required careful consideration of vendor agreements and institutional obligations regarding data privacy. To minimize risk, sensitive financial records (such as account numbers, bank information, or signed contracts) were stored in the institution's secure SharePoint environment, with ClickUp used primarily as a task-tracking and communication layer. This separation reduced exposure of sensitive data while maintaining the efficiency of centralized workflows. Regular vendor compliance reviews also ensured that the use of third-party platforms did not conflict with licensing agreements or institutional privacy standards.

Institutional Collaboration

The implementation of these safeguards required collaboration with the central IT and finance offices. By aligning ClickUp's workflows with institutional compliance frameworks, the library built confidence that invoice management practices met broader institutional requirements. This collaboration also positioned the library as a responsible steward of financial data, strengthening relationships across departments.

Sustainability of Security Practices

Finally, documenting these security measures within the library's procedural manuals ensured continuity despite student worker turnover. Each new intern or staff member was introduced to the library's security protocols during onboarding, reinforcing a culture of accountability and compliance. This sustainability ensured that the efficiencies gained from workflow automation were not offset by new vulnerabilities.

Impact on Operations and Vendor Relationships

With automation, clear delegation, and centralized tracking, even a lean staff could handle larger invoice volumes during peak periods. Consistent payment timelines improved vendor trust, while complete records of communications aided dispute resolution. Beyond daily operations, ClickUp helped forecast peak invoice periods, align staffing with demand, and improve budget planning.

ClickUp transformed the library's invoice management from a fragmented, error-prone process into a centralized, scalable, and efficient workflow. By combining task decomposition, workflow visualization, automation, reporting, and compliance, the system not only improved operations but also positioned the library to better serve its mission: ensuring uninterrupted access to essential resources.

Brief Discussion on Return on Investment for Workflow Automation Tools Using ClickUp

The adoption of ClickUp for invoice management significantly improved our library's operational efficiency by reducing administrative burdens, improving accuracy, and freeing up valuable staff time for more strategic tasks. In this case study, return on investment (ROI) is measured not only in financial terms but also in time saved, error reduction, productivity, and scalability—areas where libraries, regardless of size, often face persistent constraints.

The costs associated with implementing workflow automation tools can be divided into three categories: upfront costs, customization costs, and ongoing costs. As shown in table 3, our library experienced moderate upfront costs for subscription fees, setup, and training; variable costs for customizing workflows; and low-to-moderate ongoing costs for renewals and security monitoring. These expenses were quickly justified by the efficiency gains realized after implementation.

Table 3. Cost Considerations and Return on Investment Summary for Workflow Automation in Academic Libraries

Cost Factor	Description	Estimated Impact
Upfront costs	Subscription fees, setup, and staff training	Moderate—one-time investment with onboarding required
Customization costs	Workflow automation setup and integrations	Varies—depends on institutional needs
Ongoing costs	Subscription renewal, security monitoring	Low to moderate—ongoing but justified by time savings

The benefits of ClickUp became especially clear when comparing preimplementation challenges with postimplementation outcomes. As detailed in table 4, prior to adoption, our manual processes led to frequent delays, duplicate or missed payments, and strained vendor relationships. After implementation, processing time decreased by 50 percent, duplicate payments were eliminated, and vendor trust improved because of timely and accurate payments.

Table 4. Operational Benefits of Workflow Automation: Preimplementation Challenges Versus Postimplementation Gains

Benefit	Preimplementation Challenges	Postimplementation Gains
Time savings	Manual tracking led to frequent delays.	Processing time reduced by 50%.
Error reduction	Duplicate or missed payments were common.	Errors reduced to zero.
Productivity	Staff spent excessive time managing invoices.	Automation freed up staff for other tasks.
Vendor relations	Payment delays caused strained relationships.	On-time payments improved trust.

Performance metrics reinforce these outcomes. As shown in table 5, the average invoice processing time decreased from twenty minutes per invoice to ten minutes per invoice, representing a 50 percent reduction. At the same time, duplicate payments, which previously averaged three per month, were eliminated entirely. These hard metrics illustrate how automation created tangible, measurable improvements that went beyond anecdotal staff feedback.

Table 5. Key Performance Metrics before and after Clickup Implementation

Metric	Before ClickUp	After ClickUp	% Improvement
Average invoice processing time	20 minutes per invoice	10 minutes per invoice	50% decrease
Error rate (duplicate payments)	3 per month	0 per month	100% reduction

Although our experience reflects the realities of a small institution, the outcomes and lessons apply more broadly. As libraries grow in size and complexity, ROI manifests differently. Table 6 generalizes the impact of workflow automation for three contexts—small, mid-sized, and large libraries—highlighting how efficiency, coordination, and scalability align with institutional needs.

Table 6. Scaling Return on Investment for Different Library Sizes

Library Context	ROI Emphasis	Example Impact
Small/Lean-staff libraries	Efficiency, continuity, and reduced administrative burden	50% faster processing ensures a solo librarian can redirect time to instruction, outreach, or user services.
Mid-sized libraries	Coordination across multiple workflows and staff	Automation reduces duplication between acquisitions and the business office, improving accountability.
Large libraries/consortia	Scalability, negotiation leverage, and compliance	Analytics strengthen vendor negotiations, dashboards streamline multistep approvals, and reporting supports audits and ERM integration.

ERM, Electronic Resource Management; ROI, return on investment.

Challenges and Lessons Learned

Although the implementation of the centralized project management software, ClickUp, significantly improved invoice management workflows, the transition was not without challenges. Regardless of size, libraries adopting new project management systems must anticipate adjustment periods, training needs, and ongoing refinements to sustain long-term success. The following challenges and mitigation strategies reflect issues commonly encountered in both small and larger institutions.

Initial Difficulties in Implementation

Transitioning from manual or semimanual processes to an automated workflow platform requires careful planning. Early challenges often include:

- Customizing workflows to fit institutional or departmental financial practices
- Investing time in configuring task statuses, automation rules, and integrations with existing financial systems
- Addressing the learning curve for staff who may be accustomed to spreadsheets, email chains, or ILS modules

Mitigation Strategy

Libraries can address these challenges by providing targeted training focused on core functionalities relevant to invoice management. Phased adoption—allowing teams to gradually transition tasks into the new platform—can reduce disruption and provide time to refine workflows. Larger libraries may consider forming implementation teams with representatives from acquisitions, technical services, and IT to coordinate rollout and ensure institutional alignment.

Staff Resistance to Change

As with any technological transition, staff may express reluctance to adopt new systems. Common concerns include:

- Preference for familiar, manual workflows

- Skepticism about the long-term value of investing in new platforms
- Fear of added complexity or duplication of effort

Mitigation Strategy

Resistance can be mitigated by emphasizing the tangible benefits—automation that reduces repetitive work, improves transparency, and provides consistent tracking. Creating feedback loops where staff can share concerns and propose improvements fosters buy-in. In larger libraries, piloting the platform in one department before scaling institution-wide can demonstrate success and build momentum.

Long-Term Sustainability Concerns

Sustainability is a consideration for any library, whether small or large. Key concerns include:

- Cost—Free tiers may suffice during pilot projects, but premium features (automation, integrations, advanced reporting) often become necessary as workflows expand.
- Scalability—Libraries must ensure the chosen platform can handle increasing invoice volume, multistep approval chains, and cross-departmental coordination.

Mitigation Strategy

Conducting a cost-benefit analysis and benchmarking against alternatives helps justify the investment. Efficiency gains, error reduction, and stronger vendor relationships often outweigh subscription costs. For larger libraries, scalability may also involve ensuring system integrations with ERM systems or consortial financial tools. Maintaining adaptable workflows helps prepare for future transitions if institutional needs change.

Security and Data Privacy Concerns

Because invoice management involves sensitive financial data and vendor agreements, security is a central consideration. Concerns include:

- Storing financial data in third-party platforms
- Ensuring compliance with institutional IT and financial policies
- Managing role-based permissions across multiple staff or departments

Mitigation Strategy

To minimize risks, libraries should establish strict access controls, align workflows with institutional compliance frameworks, and use integrations (e.g., with SharePoint, Google Drive, or ERM systems) to store sensitive financial documents in secure environments. Regular security reviews and collaboration with IT or finance teams help ensure compliance and reinforce institutional trust. Larger libraries may also require system-wide audits or formal vendor risk assessments before adopting new platforms.

Outcomes and Impact

The implementation of ClickUp has significantly enhanced the clarity, accountability, and coordination of the library's invoice management workflow, which is particularly important in a setting staffed by a solo librarian, student workers, and an intern with academic and athletic commitments that take precedence over library tasks. The primary benefits of ClickUp in this case study include:

- Improved task responsiveness across staggered schedules: While invoice turnaround time remains dependent on individual work schedules, ClickUp ensures prompt processing by assigning each invoice task directly to the intern. Upon beginning their next shift, the intern consults a personalized dashboard that prioritizes invoice-related tasks, allowing for efficient action without confusion or delay.
- Centralized and transparent tracking of all invoices: All vendor invoices—including those for print materials, electronic resources, EdTech tools, open-access services, and training platforms—are now fully logged, tracked, and moved through a standardized ClickUp workflow. This centralized approach eliminates prior fragmentation and ensures continuity, regardless of who is working.
- Stronger handoffs and reduced bottlenecks: ClickUp's task assignment and dashboard features enable seamless collaboration between the library director and student staff. When the library director receives an invoice or contract, it is logged and assigned immediately, creating a clear handoff and ensuring progress is not stalled. The system also maintains a complete audit trail for institutional accountability and reporting.

Rather than emphasizing rigid turnaround times, these outcomes demonstrate how ClickUp supports scalable, resilient workflows and ensures consistent invoice processing even within the constraints of a lean and rotating staff structure.

Conclusion

Based on the successful adoption of ClickUp, this case study offers practical strategies for academic libraries seeking to streamline invoice management through scalable, technology-enabled workflows. Academic libraries often face inefficiencies stemming from decentralized processes that disrupt invoice tracking, vendor communication, and financial reporting. To address these issues, adopting an integrated project management platform—whether ClickUp, Trello, or a comparable system—can centralize operations, minimize fragmentation, and create repeatable structures that scale with expanding collections and vendor relationships. Early adoption of such systems supports smoother transitions and operational continuity.

Because every library operates under distinct institutional constraints, workflow transformation must begin with a careful mapping of existing processes. Identifying bottlenecks, clarifying task dependencies, and pinpointing inefficiencies create the foundation for automation. Once mapped, repetitive tasks such as invoice status updates, check request submissions, and vendor follow-ups can be automated to reduce administrative burdens and support asynchronous staffing models. Embedding automation into daily routines reflects Lewin's "unfreeze-change-refreeze" model, enabling new operational habits to take root and persist over time.

Equally important is the role of data in guiding performance improvement and long-term planning. Libraries that incorporate reporting tools—whether through ClickUp dashboards or external platforms like Tableau—gain visibility into processing time, vendor responsiveness, and budget cycles. These insights support transparency, accountability, and evidence-based decision-making, strengthening both internal planning and external negotiations.

Clear communication across library staff, finance teams, and vendors is also essential. Centralized project management platforms embed collaboration directly into workflows through in-task comments, role-based permissions, file sharing, and automated alerts. This reduces friction, ensures accountability, and prevents delays that compromise vendor trust and resource access.

The transition from manual, fragmented processes to an integrated platform not only improved efficiency at our library but also strengthened vendor relationships and provided valuable insights for long-term planning. Key takeaways include the importance of selecting a user-friendly system, tailoring workflows to institutional needs, and providing sufficient training to ensure adoption. For smaller libraries in particular, automation and scalability enable lean staff to manage increasing workloads without compromising accuracy or timeliness.

Our adoption of ClickUp has since expanded beyond invoicing to include approvals, helpdesk ticket management, and coordination of educational technology tools. This broader use demonstrates how project management platforms can reinforce communication, support cross-departmental projects, and strengthen organizational culture. By embedding such systems into diverse areas of library operations, institutions can build resilience, accountability, and sustainability.

This case study adds to the existing literature by documenting the realities of a lean-staffed, master's-level institution—an often-underrepresented perspective in workflow automation research. Although this article focused on invoicing, the same pattern—map → standardize → automate → report—now supports approvals, helpdesk ticket triage, and educational-technology coordination in ClickUp. This extensibility suggests that lightweight project management platforms can strengthen both fiscal workflows and broader cross-departmental operations in lean-staffed academic libraries.

Acknowledgments

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17. Hines, "Common Roots, Different Systems," 31–70; Perrin, "The Best-Laid Plans of Mice and Men Often Go Awry," 71–88.

18. Alan, Hsiung, and McCaslin, "Web-Based Tracking Systems for Electronic Resources Management," 293–7; Wilson, "Beyond Library Software," 366–81; Kipps and Jones, "Things Are Looking Up," 215–23.

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Book Review

Michael Fernandez, editor

Assessing Academic Library Collections for Diversity, Equity, and Inclusion. By Karen Kohn. New York: Bloomsbury Publishing, 2025. 190 p. $90.00 hardcover, $36.00 softcover, $32.40 ebook (ISBN 9781538195734).

Assessing Academic Library Collections for Diversity, Equity, and Inclusion is a practical introduction for those who work in academic libraries who, as author Karen Kohn writes, "have a sense that they should be conducting some type of diversity assessment or audit but are unsure how to do it or are overwhelmed" (1). Kohn's book reads like an intensive, asynchronous workshop and follows a project planning approach. The text is not prescriptive; it offers four different approaches (list checking, metadata searching, diversity coding, and evaluating institutional efforts) to assess collections' diversity, with the reader selecting what works best for their institution and needs.

Kohn grounds the book in explaining and defining what diversity, equity, and inclusion (DEI) mean within the context of collection assessment, inviting readers to define diversity to align with the purpose of their prospective collection evaluation. Kohn advocates for intentionality in this process. While a longing to do the right thing is a common feeling and experience for many academic librarians, she says that "many diversity assessments stem from a general sense that the library ought to be doing more to build equitable collections. If this is your situation, you'll need to articulate a clearer motivation before designing your study" (17). Kohn offers many reasons for embarking on diversifying an institution's collections in the grounding of the book, including curricula support and ensuring that library's holdings reflect the student body, and helping prepare students to enter society, among other reasons (4–5). Each of the four assessment methods Kohn covers has a corresponding case study—except for metadata searching—authored by those who have undertaken this work. Each chapter follows a linear, narrative progression from project completion to next steps. Readers who want to cut and paste an approach will be disappointed as the narrative style instead compels them to wrestle with the pros and cons of each method, the implications of selecting one method over another, and the importance of doing the work.

List checking, Kohn explains, is the only method that allows for identifying what an institution does not have in their collection. List selection and compilation will be the most intensive portion of this approach. Which type of list (award winners, bibliographies, and vendor lists are the most popular approaches) one uses comes with its own considerations and drawbacks, and once this is selected, the process is a simple holdings check. List checking's accompanying case study is authored by Melissa Gonzalez from the University of West Florida (UWF). Many may be familiar with UWF's LibGuide detailing the institution's diversity collection assessment across multiple methods. Gonzalez's case study provides the narrative behind the initiative, walking readers through the thought process behind decisions and acknowledging that this work is done within "the confines of restrictive state statutes" (77), a changing reality that most academic librarians in the United States will need to contend with. Notably, the case study includes using Bowker Book Analysis System (BBAS) collections software, so

users who do not have BBAS access will need to adjust their expectations for time and labor involved in this method.

Metadata searching is an attractive way to evaluate much of an institution's holdings, but Kohn flags serious concerns "using subject headings to quantify and evaluate diversity in terms of practicality, accuracy and sensitivity" (84). This method, which is available to most academic libraries, requires evaluating Library of Congress Subject Headings (LCSH) and Library of Congress Classification Numbers (LCCN). Despite, as Kohn notes, myriad examples in the literature noting bias present in LCSH vocabulary and LCCN classification, this may still be a compelling option to search an institution's holdings quickly. If adopting this approach, Kohn wisely warns that those partaking in the evaluation will likely encounter offensive and harmful language. The metadata section offers three types of metadata LCSH compilations for "Queer LCSH," "Trans and Gender Diverse LCSHs," and "Racism (Researching Racism): Identifying available books (print and electronic)" (table 7.1, 84–85). Although these are great resources, this section would have been strengthened by the inclusion of a case study chapter on metadata. An institution using one of these metadata compilations to evaluate its collection would elucidate the labor and timeline associated with this method. Similarly, there are brief image-based examples of a query run in Primo using call numbers as well as one in Alma Analytics using subject search terms related to racism. This chapter is made better for those examples, but a fleshed-out case study would benefit readers who want to adopt this approach.

The diversity coding approach can be applied to the identity of a work's author or the content of the work itself. Kohn focuses primarily on coding author identity, with two clear considerations: the labor and the care needed to undertake coding. Due to how time-consuming this approach (i.e., coding individual works or individual authors) is, one will need to focus on a sample of an institution's collection or a subset. The care involved in diversity coding, Kohn notes, is significant because it addresses individuals' identities. Kohn offers examples of resources for determining an author's identity and makes note of places and methods that are not appropriate, such as relying on a picture to determine an individual's ethnicity or relying on a name to determine gender or national origin. Kohn's overview chapter includes samples of institutions that undertook coding projects (table 8.1, 97–99); its accompanying case study by Artemis D. Vex and Ruth Castillo of Emory & Henry University shares online resources and toolkits they have developed on diversity assessment codes—great resources for those who choose this methodology.

Evaluation of institutional efforts, unlike the other methods, does not assess a collection's content. Institutional assessment will often occur two ways. The first includes initiating a goal or project, such as holding staff discussions on DEI topics and then conducting a survey of staff on existing strategies for collecting (133). The second concentrates on evaluating existing efforts, such as assessing whether an institution's collection policy includes language on diversity. This method's corresponding case study by Karin Wikoff of Ithaca College showcases a suite of projects related to different aspects of the collection, including areas previously not covered, such as marketing e-resources and liaising with other departments on shelving choices.

Assessing Academic Library Collections for Diversity, Equity, and Inclusion is a great starting point for those interested in assessing their collections. It compiles assessment approaches that were often available only in standalone journal articles, webinars, or as sections within larger books related to DEI in academic libraries. Kohn's successful assessment breakdowns would not be as effective without her consistent advocacy that this important work should not be shouldered by minoritized and nondominant communities. Kohn illustrates assessment methods deftly, although the true success of this book will be determined by those who take up the mantle and apply it to their own institutions.
—*Maria Planansky (planansky@alfred.edu), Alfred University, Alfred, New York*

Book Review

Michael Fernandez, editor

The Digital Accessibility Handbook for Libraries. By Carli Spina and Rebecca Albrecht Oling. Chicago: ALA Editions, 2025. 280 p. $59.99 softcover (ISBN 9798892553148).

The Digital Accessibility Handbook for Libraries is a comprehensive how-to guide on making libraries more user-friendly for patrons with disabilities. The intended audience is librarians, library students, and other library professionals beginning their accessibility work. Many of the insights related in this text would be helpful to professionals in institutions working to design new spaces or services for their constituency. Institutions embarking on usability testing of their physical and online spaces would also benefit from the insights in the *Handbook,* especially chapter 7. Although the overt focus of the book is on patrons with disabilities, the authors do an excellent job of establishing that accessibility benefits all patrons: "Go beyond disability to include considering other aspects of access, such as offering testing options in multiple languages or targeting recruiting to ensure different segments of the community are represented" (78). The authors emphasize the incredible value of inclusive design in digital and physical library spaces and services, demonstrating why buy-in from patrons—especially disabled patrons—will benefit libraries. The *Handbook* explains governing legislation and current practices, attempts to look forward to the future of accessibility by exploring new and emerging technologies, and provides suggestions on how they can be applied to making libraries more usable. For example, chapter 7 includes detailed instructions on how to use accessibility features in both iOS and Android for testing purposes (142).

The *Handbook* is on par with other resources supporting accessibility in libraries, including *Web Accessibility: Practical Advice for the Library Information Professional* edited by Jenny Craven, *Serving Patrons with Disabilities* edited by Kodi Laskin, *Creating Inclusive Library Environments* by Michelle Kowalsky and John Woodruff, and *Universal Design for Learning in Academic Libraries* edited by Danielle Skaggs and Rachel M. McMullin, as well as countless other articles and reports published in the area of accessibility in libraries, many of which are referenced in this book.[1] The *Handbook* compiles the different individual reference focuses to create an extensive resource for libraries on accessibility, usability, and disability. The authors succeed in summarizing key concepts in accessibility and library usability, providing valuable insight to their readers.

Chapter by chapter, the authors focus on different aspects of accessibility and usability in libraries. Chapter 1 begins with an introduction of foundational and governing legislation regarding accessibility in the United States, as well as summarizing different types and levels of impairment or models of disability. Chapter 5, "Digital Media and File Accessibility," considers the entire footprint of the library—from file types and storage to accessible keyboards—and provides actionable considerations to help librarians build momentum toward a more accessible, usable online library. For a crash course in web accessibility, chapter 3, "Principles of Web Accessibility," is a must read. For libraries short on staff and funding, but high in need, chapter 4 ("The Accessible Library Website") and chapter 13 ("Digital

Accessibility on a Budget") provide detailed suggestions on exactly where librarians can start making their online spaces more welcoming to all users. These chapters introduce the accessibility principle under discussion, as well as how the topic affects patrons, or could be applied to libraries, while providing an extensive and comprehensive list of references for readers in each area.

The authors do not shy away from stating how difficult and ongoing the path to inclusivity is, stating, "As librarians we are trained to admit what we don't know and fear getting things wrong. This is all a normal part of the imposter syndrome we feel when we approach technical tasks that deeply affect our users" (133), but they deliver excellent understanding of the challenges librarians face and offer research and practice-informed recommendations to overcome them. In fact, many chapters start out with a real-life example of a patron's challenge when confronted with an inaccessible library service or space. For example, chapter 4 shares a familiar scenario, "a blind patron wants to use the library's website to sign up for an upcoming book club but finds that their screen reader is incompatible with the accessibility overlay on the site" (73). Spina and Oling then equip the reader with the knowledge, tools, and guidance to address the described scenario and similar situations in the future.

The standout feature of this book is the inclusion of interviews with library professionals who are working on accessibility initiatives. Placed at the end of each chapter, these question-and-answer segments help to reiterate the accessibility concept discussed in the chapter, as well as provide the reader with advice and practical application of those concepts in libraries. These key insights help to show librarians that real inclusivity can be achieved and consistently improved upon. The interviews also help to establish a community of care, encouraging librarians to reach out to community experts and library colleagues for guidance or assistance. Chapter 10's "Top Tips" is an interview with Jingling Wu from Texas Tech University Libraries, which provides ideas and recommendations for librarians seeking to implement artificial intelligence into their accessibility work, specifically improving website accessibility (194).

Overall, *The Digital Accessibility Handbook for Libraries* helps to organize the overwhelming world of accessibility in small bites for librarians, library students, and other professionals by summarizing not only critical principles but also current research in library accessibility. Spina and Oling set out on the essential task of demystifying accessibility principles and practice while maintaining a patron-centric approach to accessibility. They focus on individual experience rather than compliance; in their own words, "It is true that institutions must meet the legal requirements of their jurisdiction, but they can and should strive to then continue to work with disabled individuals to make their spaces, collections, services and communities inclusive, usable and user friendly" (16). The *Handbook* is a thorough introduction to current inclusivity practices and library principles, and it empowers readers to look to the future—not only in assistive technologies and their applications, but to put usability at the head of their considerations when they build and redesign spaces and services. Going one step further, the authors stress the importance of what they call "meaningful inclusion" (16). Spina and Oling encourage librarian readers to focus on the whys of accessibility and how usability of digital and physical spaces

can make or break a users' relationship with the community and resources. The authors gently encourage developing a community of advocacy, integrating empathy and awareness in every aspect of library spaces and services.—*Faye O'Reilly (faye.oreilly@wichita.edu), Wichita State University, Kansas*

Note

1. Jenny Craven, ed., *Web Accessibility: Practical Advice for the Library and Information Professional* (London: Facet Pub, 2008); Kodi Laskin, *Serving Patrons with Disabilities: Perspectives and Insights from People with Disabilities* (Chicago: ALA Editions, 2023); Michelle Kowalsky and John Woodruff, *Creating Inclusive Library Environments: A Planning Guide for Serving Patrons with Disabilities* (Chicago: ALA Editions, an imprint of the American Library Association, 2017); Danielle Skaggs and Rachel M. McMullin, *Universal Design for Learning in Academic Libraries: Theory into Practice* (Chicago: Association of College and Research Libraries, 2024).

Book Review

Michael Fernandez, editor

The High-Impact Digital Library: Innovative Approaches for Outreach and Instruction.
By Anna Neatrour, Jeremy Myntti, Rachel Jane Wittmann, Rebekah Cummings, Jane Monson, and Megan Myres McMillan in collaboration with Core. Chicago: ALA Editions, 2025. 160 p. $64.99 softcover (ISBN 979-8-89255-581-4).

In today's media-rich environment, if digital librarians are not reaching out to their communities, how are they ensuring they are able to collect materials of value and let users know they exist? This is the question at the heart of *The High-Impact Digital Library: Innovative Approaches for Outreach and Instruction.* Using survey responses, interviews, and case studies, the authors show how outreach and instruction should be a core part of the digital librarian's job.

Although this book positions itself as providing "innovative approaches" for outreach and instruction in digital libraries, it also reads as a new addition to the mid-2000s "Accidental Series," where digital librarians, archivists, and special collections librarians who find themselves "accidentally" in outreach roles can learn about success stories and failures, and pick up tips.[1] One of the main questions asked in the interviews is whether outreach is in the interviewee's job description. In the majority of cases, the librarians and archivists interviewed are doing outreach because there is an expectation that outreach efforts be done by their position rather than it being a formal aspect of their job. Outreach ranges from community tabling events and running social media accounts to teaching classes on digital collections. Some of the professionals feel qualified and supported in their outreach efforts, whereas others are more hesitant or struggling to find the time in their busy schedules.

The theme of accidentally needing to perform outreach to collect digital materials and show their value continues into the case study section of the book. While many of the examples are from three of the authors' home institution, the University of Utah, they do a good job of showcasing a variety of libraries and archives, digital collection types, and outreach efforts. Chapter 5 ("Digital Scholarship and Digital Humanities"), which highlights outreach efforts for digital scholarship and digital humanities, was particularly interesting to me because it seems like a natural partnership, but it turns out that connecting with faculty and students studying digital humanities still takes significant effort.

It is inevitable that a book full of case studies from the last few years will mention the COVID-19 pandemic. Several of the case studies in the book seek to demonstrate how the rapid move from in-person to online communication and learning during the pandemic led to a greater appreciation and need for digital libraries and librarians. It also led to a greater need for outreach when seeking to create collections quickly.

The pandemic and the events and movements that took place during it, such as the Black Lives Matter protests, provide the authors a timely framing to describe the struggles of creating collections in response to rapidly evolving events with rapidly evolving technology. The authors acknowledge the difficulties librarians and archivists face when creating rapid-response or community-driven projects.

I appreciated that they included sections on the difficulties archiving social media (particularly Twitter/X) when previously successful archiving methods fail. They also mention the idea of trauma-informed collecting, both for the community and for the librarian or archivist doing the collecting and processing. Including these examples allows the reader to gain a greater understanding of the levels of expertise that go into creating digital collections and highlights the value of connections with other experts, including those inside and outside the field.

With its wide-ranging subject matter and study types, the authors generally do a good job of maintaining focus on outreach and instruction, but the book does meander from the point occasionally with sections that feel slightly out of place in the overall thesis. For example, in chapter 2 ("Survey and Interview Findings"), one of the interviewees was a rare books librarian whose work barely touched digital libraries. While the interview is interesting to read—the librarian is definitely performing outreach and instruction—the authors acknowledge the work is outside digital libraries and make a somewhat flimsy attempt to tie the interview into digital libraries. I suspect their interviewee screening could have been more stringent to ensure the professionals interviewed were working with digital libraries, or they could have simply chosen to leave this particular interview out of the book.

I was pleased to see an acknowledgment of what I felt was missing from the book in the conclusion, namely, the effect of generative artificial intelligence (AI) on digital libraries. The authors express a hopeful, but cautious tone when describing ways in which AI may transform or harm the work of digital librarians and archivists, and the collections they curate. While I will admit that I am not a digital librarian or archivist, as a librarian who has frequently found myself performing tasks well outside my job description, I related to the stories and studies in this book. I was also left with a good sense of how essential outreach is to ensure digital library content is collected and discoverable. Given the breadth of examples, those who do work in digital libraries will definitely find ideas for expanding their outreach and instruction efforts, and increasing the impact of their digital library, just as the title promises.
—*Meghan Burke (meghan.burke@queensu.ca), Queen's University, Ontario, Canada*

Note

1. "The Accidental Series," Books.Infotoday.com. Information Today Inc., accessed October 3, 2025, https://books.infotoday.com/accidental.shtml.