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LibLime Launches LibLime Enterprise Koha, or, Rift Splits the Koha Development Community

Koha, the first open source integrated library system, has made steady gains in its functional capacity and in the number of libraries adopting it as their primary automation platform. Within the United States, roughly 342 libraries representing a total of 535 facilities have implementations of Koha complete or underway. LibLime ranks as the dominant Koha development, support and hosting vendor.

Part I. LibLime Enterprise Koha

LibLime has launched an enhanced version of the open source Koha ILS, called LibLime Enterprise Koha (LLEK), hosted on a highly-scalable platform and designed to offer a broader set of functionality with high reliability and fast performance. LLEK makes use of Amazon's platform-as-a-service cloud computing infrastructure.

This version includes a variety of enhancements that have been sponsored by LibLime customers as well as separate modules that LibLime has developed outside the Koha software itself. Some of the enhancements to Koha currently available only in LibLime Enterprise Koha include support for MARC21 holdings formats, 13-digit ISBNs, an off-line circulation utility, check-out slips sent to an e-mail address, hourly loans for course reserves, batch loading of patron records, granular staff user permissions and enhanced SIP2 capabilities.

LibLime also bundles Biblios.net and GetIt as part of the LLEK package. Biblios.net is a cataloging utility that includes a large body of MARC records in the public domain, allowing libraries to easily identify and import records into Koha. LibLime is also developing GetIT, a stand-alone library acquisitions utility with hierarchical fund accounting and vendor records with ordering and invoicing features. Both Biblios.net and GetIt have been designed to integrate with any ILS and are not specific to Koha.

Other companies, both within the United States and internationally, have been involved in similar business activities, as mentioned in last month's *Smart Libraries Newsletter*. These include PTFS and ByWater Solutions in the United States, PTFS Europe, BibLire in France, Turo Technology in the United Kingdom, Catalyst IT Limited in New Zealand, and others. (See <http://koha.org/support/pay-for-support> for a more complete list.)

LibLime Enterprise Koha includes many features and enhancements not available in the public version. This product is available only through LibLime's software-as-a-service hosted option and is not available as software for installation on servers hosted by the purchasing library. The GPL open source license under which Koha resides allows private modifications to be made to the software as long as that software is not distributed further. LibLime's practice of hosting Koha with private modifications does not violate the GPL license.

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Many of the enhancements found in LibLime Enterprise Koha were subsidized by development contracts made with LibLime's customer libraries. One of the major customers involved in supporting LibLime's development efforts is the Westchester Academic Library Directors Organization (WALDO). In January 2008, WALDO contracted with LibLime for support services and development to implement Koha for its 12 full members and for other libraries that choose to acquire the software through the consortium. The contract for the original 12 members with LibLime included \$282,000 for the core functionality needed for the initial implementation, \$210,000 for supplemental enhancements and an additional \$200,000 contingency, totaling \$692,000 toward the enhancement of Koha. An additional 9 libraries have now joined the WALDO contract, which requires a development contribution from each participant. These new members have committed an additional \$122,000 for software development. In addition to WALDO, other LibLime customers have funded specific development projects.

The enhancements to Koha funded through LibLime contracts will initially be made available to only its own customer base, giving it a competitive advantage over the other organizations involved with Koha support. LibLime indicates that it will ultimately contribute the source code of its enhancements to the public version, but only after it has been deployed to its own customers for a pre-determined period of time. LibLime continues to voice strong support for the open source development model, though it has altered its processes to favor its own library customers and to preserve its competitive advantage. Joshua Ferraro, CEO of LibLime, states that the new products and software development process represent a more sustainable business model for the company.

The company also launched Koha Express in September 2009, a hosted, self-

service version of Koha which libraries activate through an online e-commerce process. Libraries pay an annual subscription fee of \$299 per year for Koha Express and take responsibility for migrating and loading their data. Libraries subscribing to Koha Express can take advantage of the online documentation, Koha mailing lists and other self-help and peer groups for support but do not have access to LibLime's customer support personnel. Koha Express is based on the public version of Koha, minus the LibLime-specific enhancements.

LibLime also continues to offer support services for what it calls Koha Community, the public version now maintained by developers external to LibLime that does not include its private enhancements. LibLime has many customers on this platform and will continue to offer installation, migration, and support services for either hosted or locally installed sites.

Part II. The rift

Until recently, the development of Koha had been accomplished through a collaborative process, even among competing companies. It was a system where companies would compete for library customers, but where all contributed toward the development of a single strain of the Koha software. A release manager, appointed from within the community of developers, coordinated the integration of the patches and enhancements from all of the programmers involved with Koha across all of the affiliated companies and support organizations.

LibLime's launch of a private hosted version, though legally compliant with GPL, has enraged the other companies involved with Koha. Deep animosity now exists between LibLime and the other companies and individuals involved in the support and development of Koha. The prevailing view among the developers external to LibLime is that there has

been a fork in Koha development, a state where multiple independent versions split apart with significant variations. LibLime issued a statement proclaiming that it does not consider its version a separate fork of Koha. Once the software forks, each branch takes its own path of feature enhancement, version control, and patch management. Due to the fact that independent and separate software development performed by LibLime will be contributed back only after it has been used by its own customers for a period, there is no practical way to coordinate development and bug fixes. In a field like library software, which is characterized by a scarcity of development resources, support of multiple versions of a product is far from ideal.

From its founding in early 2005 until mid-2009, LibLime actively contributed fixes and enhancements to the public version of Koha. LibLime asserts that during this period, it contributed the vast majority of the programming for Koha, incurring significantly higher costs than what it was receiving in fees for sponsored development. As new competitors entered the fray, the company found it necessary to channel its resources toward its own customers first and to the broader Koha community secondarily. Consequently, LibLime has withdrawn from the cross-company collaborative group and now performs its own separate development effort.

There has been an exodus of personnel from LibLime. Some of the departures are part of normal turnover and others are related to the rift between LibLime and the broader development community. Many of the personnel appointments for which LibLime previously issued press announcements have left the company. These include Debra Denault, Senior Vice President of Operations, who is now Director of Customer Service at Relais International; Galen Charlton, VP of Research and Development is now VP for Data Services at Equinox Software; Joe Atzberger is now an Evergreen Developer at Equi-

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nox Software, Nicole C. Engard, Open Source Evangelist for LibLime, is now the Koha Documentation Manager jointly employed by ByWater Solutions and BibLibre. Other technical personnel including J. David Bavousett and Chris Catalfo have also left the company. LibLime has shifted from employing full-time programmers to contracting for outsourced development services.

Since the rift took place, both communications and development have parted. LibLime has been absent from the public Koha development lists and IRC meetings. LibLime operates mailing lists open only to its customers. The non-LibLime developers continue to work with the public version of the Koha codebase while LibLime plows its efforts into the premium enhancements involved with LLEK.

While its competitors complain that LibLime Enterprise Koha represents a fork in the codebase, LibLime counters that forks are not unprecedented. Ferraro points out that the catalog for Horowhenua Library Trust, the original Koha implementation, contain modifications that have not been integrated into the public codebase. He maintains that

LibLime has historically contributed all of its development into the public version and that the volume of development performed by LibLime greatly exceeds that of other individuals and organizations involved with Koha. Though it will be through a delayed process rather than its previous practice of real-time updates of its development to the core Koha repository, Ferraro insists that LibLime remains committed to contributing the code it develops into the public version.

In September, the various companies involved with Koha support and representatives from libraries using the software have begun discussions to create some kind of oversight group or foundation for Koha. LibLime has not participated in these discussions. LibLime currently owns key assets related to the software including the koha.org domain, trademarks on the Koha name and the Koha logo, as well as copyrights to software and documentation. Much uncertainty remains about any broader organization that might be established to

coordinate Koha development and maintain legal ownership of the intellectual properties associated with the project.

Despite these circumstances, LibLime continues to win contracts for its services. Recent libraries signing up with LibLime include Hiwassee College and the SIT Graduate Institute. Some libraries have also

Despite these circumstances, LibLime continues to win contracts for its services.

moved away from LibLime. INCOLSA, Inc, which man-

ages a consortium of libraries in Indiana using Koha, recently shifted its support contract from LibLime to PTFS.

These events illustrate that open source library automation comes with its own set of complexities, including strident competition for library customers. In today's environment libraries not only have choices between proprietary and open source automation products; they also have multiple options among vendors providing support and hosting services and now variations in the software itself.

—Marshall Breeding

Meet on the Cheap with Dimdim

In these difficult economic times, many libraries and library-related organizations are trimming or eliminating their travel budgets. Traveling to conferences, workshops, and meetings is a time-honored way to network with colleagues beyond your organization, to learn new professional skills, and to discuss the trends, challenges, and opportunities facing libraries and librarianship. Professional travel is great, but it is also expensive and isn't the greenest human activity.

Fortunately, there are many alternatives to traveling to face-to-face events. Librarians and libraries are exploring these alternatives with increasing awareness and vigor. Many library organizations now use freeconference.com and similar telephone conferencing services that, while not really offering free conference calls, spread the cost of the call over all of the participants, taking a small bite out of everyone's budget, rather than a big bite out of one. Telephone conference calls are ubiquitous



and almost everyone knows the rules and etiquette, but just *talking* amongst ourselves seems a little passé at a time when co-browsing, file sharing, text chatting, polling, and other cool communication tools are ascendant.

Dimdim proclaims itself to be the easiest web conferencing solution.

participated in a brown bag luncheon being held over a thousand miles away via a series of Twitter tweets on the hot topic of mobile libraries. “Bring your own brown bag” is as valid a concept whether you are attending from a distance or you are attending in person.

Many libraries and library-related organizations are also using webconferencing software with increasing frequency to hold online meetings and events. The brands of webconferencing software programs and services are legion: Adobe Connect, GoToMeeting, Elluminate, Wimba, and many others. An interesting little subset of webconferencing software and services are programs that are free, in the sense that there is no out-of-pocket expense to use them. Of that subset, Dimdim is the service that seems to be the leader. If you want to meet on the cheap online, you may want to try Dimdim.

Dimdim offers several levels of service. Dimdim Free allows you to host or attend an online meeting or event with a maximum of 20 attendees. The functionality allowed with the free account includes voice-over-IP and webcam support, public and private text chat, desktop sharing, presentation slide sharing, co-browsing, whiteboarding, annotation tools, the ability to record a meeting or online event, and a free audio conference bridge.

Dimdim Pro, which costs \$25 per month after a free 30 day trial (or \$99 per year), allows subscribers to hold online meetings with up to 50 attendees. In addition to the basic functionality included in the free account, the Pro version includes two-way and high-resolution video, customized branding of the online event space, registration widgets (which you can use to announce and promote an event via a website, wiki, Facebook, Twitter, etc.), usage reports and analytics, a mashable open API for integration, premium support services, and a generally fast and secure online event experience.

Dimdim Webinar, which costs \$75 per month, increases the online meeting capacity to 100 attendees, and the online event capacity to 1,000 attendees. Dimdim Webinar includes even more features, such as the ability to pass control to co-presenters on the fly, streamlined event templates, embeddable registration widgets, and more.

Dimdim Enterprise, which can be hosted by Dimdim or loaded locally, is designed for enterprises, service providers, and educational institutions that have many online meetings and events. The one-year cost for Dimdim Enterprise is in the

Skype, Twitter, and other Web 2.0 tools are being used as substitutes for in-person meetings, as well. Recently, I par-

neighborhood of \$11,000. This subscription includes a dedicated server if you choose to go the hosted service route, technical support, and free upgrades.

Dimdim also offers an Open Source Community Edition of their software, which, according to the website, “is meant for developers, highly technical enthusiasts and for use in non-critical environments. It has most of the features of Dimdim Enterprise and is based on open source streaming and media components.”

Dimdim works right in your browser. There is no need to download and install any plug-in or client software, unless you want to use the desktop sharing feature, which requires that a plug-in called Screencaster (approximately 2 MB) be downloaded and run. The vast majority of Dimdim functions and features rely on Adobe Flash, which nearly all computers have.

The accessibility of Dimdim to blind and low-vision users remains a concern. In general, Adobe products do not receive high marks in the accessibility column.

Regardless of which type of account you hold, all users of Dimdim need to create an account. The signup process is simple and quick. The only personal information you need to supply to create an account is an email address.

Like any software or service, Dimdim has its strong and weak areas. When I tested Dimdim Free (version 5.1) on a satellite Internet connection, the response times in general seemed to be slower than with other webconferencing software I have used.

A feature that allows you to upload presentation slides right from your hard drive is efficient. Another nice feature is that once the first few slides have loaded, you can begin your presentation, and the other slides can finish loading as you begin your introductory remarks. The presentation slide viewer also has some interactive and value-adding features built-in, such as a pointer and the ability to overlay objects and text onto your slides on the fly as you present them.

The recording feature is easy to launch and use. One downside is that whiteboarding and co-browsing activities are not part of the recording. Evidently, the public text chat is recorded in a separate file and is not automatically included in the playback of the main recording. Another downside is that the recording is saved on the Dimdim server farm, not on your local computer or any server that you control. Once you stop recording, you need to wait for Dimdim to send you an email message containing information on how to access the recording. Then you may download and save the recording.

Dimdim proclaims itself to be the easiest web conferencing solution. Ease of use certainly is one of the basic ingredients for a successful, productive online meeting or event. The feature set and reliability are important as well.

— Tom Peters

More Info. @:
<http://www.Dimdim.com>

IMLS funds \$1 million for major Open Source ILS project

In a major boost for open source library automation, the Institute for Museums and Library Science has funded a grant proposal, *Empowered by Open Source*, to facilitate the adoption of open source automation software in libraries. Led by the King County Library System in Washington State, along with three other major public library systems, the \$998,556 award will help create resources that will help libraries break away from proprietary ILS products and make the transition to open source alternatives. The institutions involved will match the IMLS funds with \$1,014,400 of in-kind contributions. The grant was part of the \$17.9 million distributed to 51 institutions as part of the National Leadership Grants announced in September of 2009.

As an IMLS demonstration grant, the processes developed by the King County Library System and the other participants will function as a roadmap for other libraries interested in following a similar course away from proprietary ILS to the open source alternatives. The deliverables of the grant-funded project will help establish open source library automation as a routine option and will address many of the obstacles that have stood in the way of the adoption of this approach by mainstream public libraries.

A key component of the three-year project is the creation of a network where libraries interested in or involved with open source library automation can share resources and experiences, building an ever-expanding body of assets. The grant proposal describes a model where libraries rely on each other throughout the process of implementing an open source library system, but where they also engage vendors as needed. The proposal argues against the business model of proprietary software, where a single vendor maintains exclusive control. This project focuses on public libraries only.

The proposal outlines four major goals:

- Promote the concept of open source software and articulate the benefits to all libraries of moving to an OSLS.
- Increase participation in OSLS projects.
- Make open source conversions a viable option for public libraries by providing infrastructure elements related to planning, implementation, training, development, and support.



- Develop a new model of peer-to-peer support for open source libraries.

As one of the largest and busiest public libraries in the nation, the ability of the King County Library System to adopt an open source automation system will demonstrate the viability of this approach for public libraries of all stripes. It ranks as the second busiest public library system in the United States, with over 19 million circulation transactions annually, serves a population of 1.2 million, and holds collections that total 3.6 million items. Only Queens Borough Public Library, with its 23,041,425 circulation transactions, tops the King County Library System.

Prior to the award of this grant, King County Public Library already had the wheels in motion when it came to shifting from proprietary library automation to open source. It implemented Dynix in 1990 and migrated to Millennium from Innovative Interfaces in 2004. In 2007, the library issued a Request for Proposals for support services in the implementation of the open source Evergreen ILS, which was awarded to Equinox Software, the primary support vendor for this product. The Galecia Group has provided consulting services related to the Evergreen project, including the creation of functional specification and assistance in developing the RFP. The library expects to complete its migration from Millennium to Evergreen in 2010.

Other library systems named as partners in the proposal include the Peninsula Library System in California, the Ann Arbor District Library in Michigan and the Orange County Library System in Florida. These three systems also currently use Millennium. All four partner institutions named in the grant are large multi-branch public library systems with high volumes of circulation. While many other public libraries have previously adopted open source ILS products, they have primarily been smaller libraries. Georgia PINES, for example is a very large consortium comprised primarily of small libraries. The institutions named in this grant extend the penetration of open source ILS into the highest tier of public libraries in terms of circulation volume and organizational complexity.

The Galecia Group will participate in the grant project as a consultant partner, providing project management, strategic technology perspectives, and other services.

The project aims to facilitate the adoption of open source library automation software in public libraries. The key assessment benchmark for the success of the project will be the number of public libraries that successfully move to open source as a result of its efforts.

Today, open source ILS represents a very small portion of the overall library automation marketplace. This project enables some increase in the potential growth of this segment. The institutions named in the grant, as well as those that will follow their roadmap, will amplify the already growing trend toward open source software for library automation.

Still, the companies offering proprietary ILS products continue to prosper. In the longer term, we can expect that a growing number of libraries will execute library automation strategies based on open source software. The competition will be vigorous, not only among different brands of automation

products, but among many different business models and software designs. Today's choices include open source (e.g. Evergreen and Koha) and proprietary license models (Millennium, SirsiDynix Symphony, Polaris, Library.Solution, etc.), traditional ILS products (Evergreen, Koha, SirsiDynix Symphony, Polaris, Library.Solution) and emerging new designs that conceptualize library automation in new and different ways (Ex Libris URM, OLE, OCLC WorldCat Local Cooperative Library System). This IMLS-funded project will bolster the open source approach, but this falls within the context of a variety of interesting options available to libraries. As the open source route becomes easier for libraries to traverse, those offering proprietary solutions will have to work ever harder to deliver products and services that libraries will deem valuable.

—Marshall Breeding

The Desk and the Aardvark

The image of a reference desk is powerful and iconic. It has become entrenched in the language of our profession. When I was a rookie reference librarian at an academic library in the 1980s, the desk was the locus of service activity. It controlled our schedules. The desk schedule was a topic of many a reference staff meeting. Often you would hear a reference librarian say to colleagues, “I cannot do that. I’m on the desk that hour.” The reference desk was literally the one tangible thing that differentiated public services from technical services. The desk ruled.

The reference desk has made a lasting impression on the way we conceptualize reference service. The idea of a reference desk as a service point has influenced how librarians think about the reference transaction. The basic idea is one where a member of the reference team is assigned to “cover the desk” during a certain period of time, usually an hour or two, longer on evenings and weekends. During busy times, two or more members of the team are assigned to cover the desk.



We usually think of the reference interview as a face-to-face, one-on-one interaction between the reference provider and the patron, user, or whatever you prefer to call that other party to the interaction. Entire books have been written about the nuances and delicacies of the reference interview, which is indeed delicate and nuanced. Our belief about the inherent nature of the reference interview at a reference desk is so powerful that we have carried the reference desk metaphor into telephone reference,

web-based reference, chat reference, virtual world reference, and even reference services delivered to the mobile phones of users. The reference desk itself may be present only in spirit, but the paradigm of one patron approaching one member of the reference team who has been assigned to “cover the desk” during that hour is made manifest in every mode of reference service that libraries provide.

The problem is that the cult of the reference desk may be blinding us to the real future of reference. The future of reference may rest in the ability of information systems to quickly tap into a large body of expertise spread across a large number of experts. Forcing a seeker of information or advice to adhere to the paradigm of a single (or small number) of reference service providers who are “on the desk” at any given moment is not the best way to quickly tap into a large body of expertise.

Aardvark is a reference service that pays no homage to the reference desk altar. In fact, whoever developed Aardvark seems to have boiled the reference

transaction down to its essence. At any given moment around the world, a sizable group of people want information and/or advice on a myriad of things. Who wrote *Charlie and the Chocolate Factory*? What is the forecast high temperature in Bangor, Maine for tomorrow? What is the best speech-to-text software for my particular purpose? The Aardvarkians developed an algorithm and information system that quickly (usually in less than 5 minutes) matches those who seek information and advice with those who know—or at least profess to know.

Here's how Aardvark works: It is an online community in the sense that you need to register in order to ask questions and receive answers. When you register, you declare at least some expertise in at least three subject areas. Please don't chortle, but when I registered I declared books, libraries, and BBQ as my requisite three areas of expertise. As other members of the Aardvark community ask questions, the system identifies just a few people to whom the question is posed. In the first month of membership I received just two questions. Perhaps the Aardvarkians aren't very bookish, bun-ish, or Q-ish.

Note that the Aardvark system is

a huge improvement over email discussion groups, which also can and do serve as communities of experts to whom information and advice questions can be posed. The structural problem with using email discussion groups for this purpose is that, by posing the question, you intrude on the attention of hundreds or thousands of people who read your question. Only a few will take the time to answer.

The Aardvark mystery machine learns through use. For example, if you receive a question that doesn't interest you, you can "mute" that topic, indicating that you aren't really interested in it or don't have expertise related to that particular question.

I have submitted a couple of test questions to the system. One involved a true search for information on my part. The response I received was generally in the ballpark of what I was seeking. The other question involved lesser known but good BBQ joints in the Kansas City metropolitan area, a topic about which I professed some expertise. The response I received (from someone who had registered as being from New York City) was actually quite good. The responder mentioned a couple of relatively obscure

BBQ joints, and I had direct knowledge that those places were hidden gems. The responder also mentioned a couple of places I had heard about but had not yet tried.

Aardvark is not the perfect reference system. The ability to clarify and negotiate the question still seems pretty clunky, but it is an interesting working model of a way to connect questioners with answers in a way that way involves no desk. It seems to be a better way to identify and tap into a big pool of expertise than the traditional reference desk model.

Nevertheless, libraries may not want to throw the desk out with the bathwater just yet. Tapping into a large pool of expertise in order to answer questions well and quickly certainly is a worthy goal, but many people also appreciate the one-on-one give-and-take interaction with a real human being—a vanishing entity in this era of telephone trees and automated responses. Aardvark also facilitates a one-on-one reference interaction between two people, but it lacks the implied authority that the good old reference desk conferred.

—Tom Peters

More Info. @:
<http://vark.com>

More executive changes at SirsiDynix

September 2009 saw the exit of two high-level executives from SirsiDynix. Keith Sturges joined SirsiDynix in March 2007 as president of SirsiDynix International, in charge of the company's operations outside the United States. In August 2008, Sturges was appointed to the position of Chief Marketing and Sales Officer in charge of sales worldwide following the departure of Bill Davidson, who had served as Chief Marketing Officer. Following the departure of Sturges, sales and marketing will report to through Matt Hawkins, Chief Operating Officer. This places all library-facing units within Hawkins' portfolio, which also includes services and client care.

John Gardiner has been named the new Chief Financial

Officer following the departure of David M. Breck. Gardiner came to the company in January 2009 as its Chief Strategy Officer from eEye Digital Security, where he held the CFO position. David M. Breck exits after serving a six-month tenure as Chief Financial Officer from April 2009 through September 2009. Breck came to SirsiDynix in November 2008 as Vice President of Finance. The CFO position at SirsiDynix has seen more turnover than would normally be expected. According to SirsiDynix Chief Executive Officer Gary Rautenstrauch, despite the personnel changes in this position, the financial position of the company remains strong and well-managed.

—Marshall Breeding



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