The Future Production and Consumption of the Scholarly Monograph:

A View from the Cornfields of Illinois

J. Stephen Downie
University of Illinois

31 July 2018
Before We Dive In

- Grateful acknowledgement of all those that created the slides used in today’s talk, including folks from:
  - Publishing Without Walls team
  - HathiTrust team
  - HathiTrust Research Center team

- Thanks to Roxanne Missingham and the Future of the Scholarly Book team for inviting me

- Thanks to Dr. Terhi Nurmikko-Fuller and her Australian National University colleagues for getting me to Australia
Agenda

- A Brief History of Me
  - From Canada to Cornfields to Canberra

- Looking at the Production Side
  - Introducing the Publishing Without Walls Project

- Looking at the Consumption Side
  - Introducing the HathiTrust Research Center

- Reviewing: Foresight from Hindsight
  - Bi-Focal Time: Revising Personal Production and Consumption Experiences into a Clearer Vision of the Future

- Questions and Answers
  - All suggestions and feedback most welcome
Project Overview

A new digital scholarly publishing initiative from the University of Illinois

- Partnership between
  - University Library
  - School of Information Sciences
  - Illinois Program for Research in the Humanities
  - Department of African American Studies

- Funded by Andrew W. Mellon Foundation
- $1M over four years (2015-2019)
PWW Team

- John P. Wilkin (PI)
- Ronald W. Bailey (Co-PI)
- Antoinette Burton (Co-PI)
- Allen Renear (Co-PI)
- Harriett Green
- Megan Senseney
- Marilyn Thomas-Houston
- Maria Bonn
- Chris Maden
- Janet Swatscheno
- LaTesha Velez
- Joshua Lynch
- Katrina Fenlon
- Jordan Kahle
Partners and Funders

School of Information Sciences
The iSchool at Illinois

University of Illinois at Urbana-Champaign
Department of African American Studies

UNIVERSITY LIBRARY
UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

Illinois Program for Research in the Humanities
Objectives

- Build capacity for participation in innovative publishing initiatives
- Conduct research and assessment of how emerging technologies align with the expressed needs of participating scholars
- Create a new model for the conceptual development of scholarly communication
“Open-access scholarship has the potential to reach a broad spectrum of potentially interested publics. We in the humanities often resist opening our work to these publics, however, fearing the consequences of such openness....

“Increasing the discoverability of scholarly work on the web, making it available to a broader readership, is a good thing, not just for the individual scholar but for the entirety of the field in which he or she works.”

Kathleen Fitzpatrick (2013)
Why Library Publishing?

“University presses are more predictable and less flexible than library publishers, with a discipline-based focus on what they publish (for efficiencies in both acquiring and marketing) and better understanding of their costs, but less ability to innovate rapidly. Library publishers are more experimental and also better at hosting and distributing large amounts of content for low cost.”

Monica McCormick (2015)
Working Groups

- Outreach and Education
- Publications and Workflows
- Research and Evaluation
Understanding Scholars’ Needs in a Contemporary Publishing Environment

Research Goals

Understanding...
1. Current publishing practice
2. How scholars consume research results and publications
3. Scholars’ personal, professional, and community objectives for publishing
4. Scholars’ perceptions of and requirements for publishing tools and platforms
5. Scholars’ perceptions of and requirements for publishing services and support

Research Methods

- Interviews
- Focus Groups
- Surveys

Want to participate? Let us know!
Selected Survey Results: Publishing Goals and Target Audiences

Primary Goals for Publishing

- To contribute new information to the field (n=121)
- To encourage and participate in dialogue about your area of study (n=106)
- To establish a formal record of your scholarship (n=56)
- To establish your reputation in the field (n=58)
- To reach the widest possible audience (n=43)
- To support professional advancement (n=42)
- To encourage the application of your research (n=32)
- To promote specific action (n=15)
- Financial remuneration (n=1)

Selecting Top Three Audiences for Scholarly Publications

- Colleagues in your discipline
- Cross-disciplinary peers
- The general, educated reader
- Students in your field
- A special targeted community
- Colleagues at your institution
Selected Survey Results: Top Challenges

Top Challenges for Print and Digital Publishing

- Reaching your intended audience
- Speed to publication was too slow
- Securing third-party permissions
- Manuscript preparation
- Getting adequate technical support for publication
- Getting adequate editorial support for publication
- Getting adequate financial support for publication
- Finding an appropriate venue for publication
- Securing a publisher

Digital
Print
Selected Survey Results: Services and Support

Authors’ Desired Publishing Services vs. Adequacy of Extant Support

- transparency in process
- peer review coordination
- digital archiving
- publisher intervention for representation of content in a...
- marketing/audience-creation support
- hosting supplementary materials
- support for navigating third-party permissions issues
- publisher intervention for organizational and conceptual input...
- instruction in working with digital publishing tools
- help planning publishing projects

Extremely important or important service vs. Very adequately or adequately supported service
## Survey Results: Preferred Tools

### Top Five Publishing Tools

<table>
<thead>
<tr>
<th>Tool</th>
<th>Used</th>
<th>Heard of</th>
<th>Not heard of</th>
</tr>
</thead>
<tbody>
<tr>
<td>WordPress</td>
<td>108</td>
<td>37</td>
<td>10</td>
</tr>
<tr>
<td>Omeka</td>
<td>45</td>
<td>44</td>
<td>64</td>
</tr>
<tr>
<td>Open Journal Systems</td>
<td>34</td>
<td>50</td>
<td>70</td>
</tr>
<tr>
<td>Scalar</td>
<td>28</td>
<td>51</td>
<td>74</td>
</tr>
<tr>
<td>CommentPress</td>
<td>15</td>
<td>24</td>
<td>114</td>
</tr>
</tbody>
</table>

Series (July 2017)

African American Studies

Humanities Without Walls
Tools and Platforms

Assessing which platform is right for you
Our Tools

- Open Journal System
- Omeka
- Pressbooks
- Scalar
Publications in the wild (Part I)

Pressbooks
- Claude Monet; The Water-Lilies: [https://iopn.library.illinois.edu/pressbooks/clemenceaumonet/](https://iopn.library.illinois.edu/pressbooks/clemenceaumonet/)

Omeka

Scalar
- #TheJayZMixtape: [https://iopn.library.illinois.edu/scalar/the-jay-z-mixtape/index](https://iopn.library.illinois.edu/scalar/the-jay-z-mixtape/index)

OJS
- Digital Literary Studies: [https://journals.psu.edu/dls/index](https://journals.psu.edu/dls/index)
Pressbooks: How it works

- WordPress-based administrative modules
- Create hierarchical series of entries for book sections and chapters
- Consistent with typical monograph structures
Why Pressbooks?

Benefits

- Easy administrative interface – based on WordPress
- Quickly create a professionally typeset book
- Can export your book in the major formats
- Strong preservation and portability

Drawbacks

- Limited number of templates
- Can only incorporate limited types of media
Structure of an Omeka Site

- Items
- Item sets
- Pages
- Sites
Why Omeka?

Benefits

- Structured platform for digital exhibitions
- Many plug-ins to extend functionality
- Widely supported
- Strong community of users

Drawbacks

- Relatively rigid site structure
- Limited site design options - Customization only possible with advanced web design skills
- Preservation and portability are a challenge
Structure of a Scalar book

Media ➔ Pages ➔ Paths ➔ Book
## Why Scalar?

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Drawbacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-media content displayed well</td>
<td>Primarily cloud-based</td>
</tr>
<tr>
<td>Flexible, non-linear structure</td>
<td>Administrative dashboard is not intuitive</td>
</tr>
<tr>
<td>Connected to multiple digital archives</td>
<td>Visual customization requires extensive web design knowledge</td>
</tr>
<tr>
<td>Can annotate media objects</td>
<td>Preservation and portability is a challenge</td>
</tr>
<tr>
<td>Community of users</td>
<td></td>
</tr>
</tbody>
</table>
Open Journal Systems

System for creating and editing your open access journal
Why OJS?

Benefits

- Free system for publishing an open access journal
- Built in editorial workflow system
- Large community of users
- Well indexed

Drawbacks

- Limited options for site design
- Administrative interface can be complex
Primary Modes of Representation

- Pressbooks: Long-form linear narratives
- Omeka: Exhibitions
- Scalar: Multi-linear narratives
- OJS: Born-digital, open access journals
The relationship between text and media

- Pressbooks: media subordinate to text
- Omeka: text describes media
- Scalar: text and media are highly integrated
- OJS: text/media expectations are a matter of journal policy
Publishing Without Walls

Audiences, Evidence, and Living Documents

Motivating Factors in Digital Humanities Monograph Publishing

Megan Senseney
University of Illinois
@modernmuchness

June 27, 2018
Understanding the needs of scholars in a contemporary publishing environment

Why do scholars choose to publish in different modalities?

What are the implications for next-generation humanities publishing?

How can we improve publishing systems and services in support of digital scholarship?
Methods

- Research design: Semi-structured interviews
- Population: Participants in PWW workshops or events
- Recruitment: Census invitation with follow-ups based on theoretical sampling
- Extent: 20 participants (to date)
- Analysis: Collaborative qualitative content analysis using Atlas.ti
Demographics

Disciplinary coverage
- Library and Information Science (7)
- History (5)
- Communications (3)
- English (2)
- Sociology & Anthropology (1)
- European, Russian, and Eurasian Studies (1)
- Recreation, Sport, & Tourism (1)

Academic rank
- Emeritus
- Full
- Associate
- Assistant
- Postdoc
- Adjunct
- Other
Motivating Factors

- Diverse Audiences
- Evidence in Context
- Living Documents
Diverse Audiences

“I’m investigating how that [research] can be made more interactive and more participatory, particularly for the communities that get involved... how do you maintain that relationship with the community, so they can be part of that in a way they have access?”
“I’m trying to figure out a way to present an analysis of... visual evidence and material evidence. I’m trying to figure out a way using digital publishing to present in a way that you usually wouldn’t be able to do if you were writing a traditional scholarly book or article in print.”
“I can update as we learn more. If I suddenly decide I’m wrong, I can add writers to it. So an evolving document…a living document. That’s the phrase people have about constitutions: that they should be a living document. I think at the moment, most of our research papers are dead documents.”
Implications for a diversified publishing landscape

- Evidence in Context
- Diverse Audiences
- Living Documents
Implications for a diversified publishing landscape

Mutable representations and multiple points of access

Evidence in Context

Diverse Audiences

Living Documents
Implications for a diversified publishing landscape

Mutable representations and multiple points of access

Evidence in Context

Data citation, versioning, and re-use

Diverse Audiences

Living Documents
Implications for a diversified publishing landscape

- Evidence in Context
  - Mutable representations and multiple points of access
  - Data citation, versioning, and re-use

- Diverse Audiences
- Living Documents

Community co-authorship
HathiTrust and the HathiTrust Research Center
HathiTrust Mission and Purpose

- To contribute to research, scholarship, and the common good by collaboratively collecting, organizing, preserving, communicating, and sharing the record of human knowledge.

- An organization with over 130 research libraries making up its membership.

- A distributed set of services operated by different members (California Digital Library, Illinois, Indiana, Michigan).

- A range of programs enabled by the large scale collection of digitized materials.
HathiTrust’s Portfolio of Work

Collection Development
- Mass Digitization
- Member Digitization
- Born Digital

Preservation
- TRAC Certification
- Integrity Monitoring
- Format Consistency & Migration

Use
- Discovery
  - Catalog
  - Full Text
  - Discovery services
- Access
  - Print Disabled Services
  - Differ for members

Rights Management
- Investigation & Determination
- Licensing

Collection Management
- Holdings Analysis
- Shared Print Retentions

Computational Research
- HathiTrust Research Center
- Derived Data Releases
- Enhancements to the Corpus

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HathiTrust “Wow” Numbers

- 16,460,342 total volumes
- 8,014,203 book titles
- 442,379 serial titles
- 5,761,119,700 pages
- 738 terabytes
- 195 miles (314 km)
- 13,374 tons

- 6,218,192 volumes (~38% of total) in the public domain

(July 2018)
Four Key Data Objects
CONTENTS.

BOOK I.
Containing a general Account of those People who have flourished at Sea in all Ages.

CHAP. I.
Of the Origine of Navigation and Invention of Shipping. Page 1

CHAP. II.
Of the Improvements in Navigation, and Naval Affairs, by the Egyptians, Phrygians, and Assyrians. p. 3

CHAP. III.
Of the Greeks, and those among them and the Neighbouring Nations who held the Dominion of the Sea, according to Euthenius's Catalogue. p. 6

CHAP. IV.
Of the Navigation and Naval Power of the Hebrews under David and Solomon. p. 8

CHAP. V.
Of the Corinthians, Ionians, Polycrates the Tyrant of Samos, the Persians, Athenians, Lacedemonians, Maullians, Tyrrenians, Spains, and Carthaginians. p. 19

CHAP. VI.
Of the Naval Power of the Romans. p. 15

CHAP. VII.
Of the Cilicians, Veneti of Gaul, Goths, Saxons, Saracens, and Normans. p. 14

CHAP. VIII.
Of the Venetians, Pilans, Genoese, Portuguese, Spaniards, and Dutch. p. 16

CHAP. IX.
Of the Swedes, Danes, Muscovites, Turks, French, and English. p. 15

CHAP. X.
Of the Dominion of the Sea in general. p. 23
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HathiTrust Corpus

(Linked) Data / Metadata
Secondary Lit
Media

...Passages, Images, Annotations...
Pieces of Books
Metadata
Books

Workset
(Research collection)

<serialized dataset(s)>

Scope
Reviewing: Foresight from Hindsight

- **Production Side**
  - Scholars want more flexible and nimble publishing opportunities
  - Library has an increasingly important role to play
  - Legacy stakeholders and formats still have very much to contribute
  - Matching scholars, content, tools and workflows a challenge but worth the effort

- **Consumption Side**
  - Scholars want more flexible opportunities to consume publications
  - Consumption will include aggregation at scale with access at various levels of granularity
  - Quality metadata more important than ever before
  - Matching scholars, content, tools and workflows a challenge but worth the effort
Questions and Answers

- Thank you very for your engagement this morning
- All questions, comments and suggestions most welcome
- Let the discussions begin!