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Open Source Lending CD's in Libraries: Howto

This document is a rough guide to how to get Libraries to accept open source CD's in their catalogue as a lending CD. This will allow anyone to borrow the CD, copy it and install the software for free. It is directed toward the Open Source community. Many thanks to all the people that have helped and encouraged me with this project.

This document is split into 4 parts. The HowTo, Understanding Libraries and My Experience, Associated documents.

The HowTo

- 1. Read and understand this document.
- 2. Read and understand the Recommendations for Open Source CD's for Libraries documents
- 3. Talk and listen to Librarians
- 4. Persuade a local vendor about the above recommendations
- 5. Buy and donate or request to libraries to buy the CD's
- 6. Go to small libraries with no budget and teaching facilities rather that big libraries that have been given big donations. Don't forget school libraries and those of Voluntary organisations Libraries
- 7. Persuade a computer magazine to put a library standard CD on the cover of its magazine and get their readers to donate the Cd's to any local library or school Library.

Understanding Libraries

The very first thing you need to know that this project has got little to do with software and everything to do with <u>Trust</u>, <u>People</u>, <u>Society</u>, <u>Finance</u> and <u>Empowerment</u>.

1. Trust: Libraries will quite rightly not trust anyone who walks in their door with a home burnt CD containing software. There are a few people out there who would like to give others virus ridden CD's just for the fun of it. These sad people who find fun in the misery of other are members of the public and thus taint the rest of us. Therefore Libraries need to have a person/company on whom they can fall back if something needs changed or looked in to. A home burnt CD, if lent out, can also be replaced by someone who borrows it. Therefore a malicious person can swap out the CD and cause damage that way. The CD must be easily identifiable to the Librarian.

A library that gives out software must not be liable for anything that goes wrong. They are not responsible for technical support, for the software or for any damage that happens due to the software installation. This should be made clear at every single stage of the lending process.

2. People who borrow the CD's will not necessarily take care of them properly. They will become scratched and cause installation problems. It is expensive for libraries to catalogue a CD. The

CD needs to be sent to the Bibliography department, assessed and then a unique catalogue number is added to each individual CD so that it can be tracked.

- 3. Society: When you first try to donate CD's to Libraries everyone you meet will look at you as if you are a salesman. This is because no one believes that there is no catch to the software, Everyone is sceptical. Explaining the GPL(General Public License) is difficult. Librarians do accept the idea of Copyleft instantly.
- 4. Empowerment. Give a man a fish and he will eat for a day, teach a man to fish and he will feed himself for the rest of his life. This is by far the most important part of this Howto. Once they realise that they can download the software themselves, that they are not dependent on you. If they can get independent reviews of the software and a responsible supplier they don't need to think about all the work that goes into creating a CD. If they need to worry about liability issues then it is not worth the effort and they just won't do it. Don't blame them, you would do the same. If they now realise that they have a viable choice where before they didn't, it will empower them to look into other possibilities of using this new information.
- 5. Finance: Is the money spent of the project worth it ? A book may have a valid use or shelf life for 10 years. A piece of software may be valid for 1 year. A book is likely to be more robust. Libraries unfairly do not get very much attention from government and are hungry for funds.

They will happily accept donations from large companies because they are of more use to the whole library system rather than one small part of it. The range of information that Libraries provides is immense. Large donations will be gladly accepted, sometimes small donations put them in jeopardy so don't expect it to change. Libraries will not accept a Lending CD if it puts at risk the chance of getting a huge donation. They may accept a poster telling people where to get the CD or software. Libraries are looking for value for money just like the rest of us.

My Experience

After reading the first part of this document you may think that this is a lost cause. I can tell you now that it is definitely not so. I have received huge amounts of enthusiasm for this project from many librarians. Librarians are clever people with an insight into a huge array of differences in society. They understand very clearly the influence that they can have in their local area and their beliefs are to inform but not dictate, to give unbiased information. They are apolitical, non religious, they are there to benefit society by giving access to all information and allowing the public to make up it's own mind. This ideal should be given the respect it deserves.

The First Donations

Edinburgh has a population of about 500,000. It has 26 public Libraries. They are all within easy driving distance.

For my very first donation. I created a folder, with a home made OpenOffice CD in it. The Cd's had pretty labels on them, I printed a flyer, included an explanation and a liability statement. I was very proud of the folder but now realise I must have scared the librarians. I created 26 of these folders and delivered each one by hand. I decided that it would be better to go individually to each library rather than post them because it would give people a chance to talk to me about what I was doing. I found out later that my reputation was going before me. When I walked into Libraries they were expecting me. Unfortunately more because what I was doing was a little odd and unexpected rather than a good idea.

I usually met either the Librarian or a Library Officer. In Edinburgh there is one Librarian for 3 or 4 libraries. When I met the Librarians they were very kind and were interested in what I was doing. With these conversations I began to understand why Libraries could not accept random donations from the public. When I met Library Officers they had to delegate any responsibility to the Librarian (their boss) although they were patient with me they could not help me directly. This was also the time that I experienced the salesman affect. It was was too good to be true. They thought I was trying to get something out of it but they didn't know how. They were also concerned that I was trying to promote a company product. Libraries are not allowed to advertise products.

Going to all the Libraries caused lots of chat in Library circles. Eventually after a long time I received a short polite letter from the head of Edinburgh Libraries saying that they could not accept my donation because it was inappropriate for libraries. I now realise why they couldn't accept my donation but at the time I was furious. I went straight to my local Member of Parliament and he directed me to my local councillor. This was because in Scotland Libraries come under the jurisdiction of local government. Parliament are not allowed to dictate what is made available in Libraries and now that I know that I realise that this is very sensible, I wish Television stations were similar. I wrote and phoned my local councillor and he contacted the Head of Libraries. This started two things. First my CD's would be accepted but not put on the catalogue. This means that the folders were kept in the libraries but were not on public display. They were also not in the catalogue so no one knew they were there. The second thing that happened was that I got a chance to meet with the assistant head of Libraries to discuss it.

Open Source Cd's in Libraries Recommendations

When I considered my first experience of going around all the libraries and noted all their concerns I then drew up my first set of recommendations for Open source CD's in Libraries document. This was a lot more complicated than it first seems. I needed a document that was fair and valid not only to Libraries but to Open Source CD vendors and distributors.

My primary concern was for libraries. What they need is:-

- 1. The liability statement
- 2. Checking for virus's at all stages of production.
- 3. A CD that can easily be uniquely identifiable.
- 4. A cover that does not break easily like a DVD case (normal CD jewel cases break easily)
- 5. A cover that is in a format that is easily identifiable by librarians The ISBN Standard.)If you are not sure what the ISBN Standard is please look at any book and then check on the Internet for greater detail. For this project it means putting the title, license, and a space for an ISBN number on it)

They needed to have a trusted source of replacements. This is where CD vendors come in. Most sell Open source Cd's but these are not appropriate for libraries because of all of the above. They all could do this and charge a little extra for the packaging. The market is now wide open.

Distributors: This is a difficult one. It is vital that these companies be supported, Redhat, Suse, Xandros, Lindows etc because they are providing financal support for a large amount of further development. Each company needs to have something unique to help pay for the development. Click and run, the Mandrake club, Sun has service and support for large companies. Some distributions have magazines and some have excellent books.

When I saw Bittorent take center stage I can understand why Redhat has backed down from selling packages. When I saw Germany, China and India sponsoring further development I knew that was where the money for development from governments. Selling open source distributions to libraries can also create revenue. With a large permanent market that would only be willing to buy

quality products on a yearly release schedule.

When I say yearly release schedule, Libraries have absolutely no use for non major releases because it costs too much money to catalogue them. If they are going to accept any at all it will be once a year and thats it. This is why they generally will not accept CD's from magazines, It is so much work to catalogue monthly Magazine CD's for them they will rightly say "just go and buy the magazine".

There is no way that I could possibly put forward a standard. There is no formal collaboration between open source communities and Libraries at the moment.(let's start one) I can only put forward recommendations. This is because I have no authority in the diverse nature of Libraries, vendors or the open source communities. The recommendations document gives a starting point for your communities to start a discussion. Don't bother screaming at me if you disagree, use your energy to start a conversation with all these groups and see what you come up with.

Getting Political

Armed with this document and a new CD in the appropriate format. I went along to the meeting. I was expecting a conflict and was completely surprised when I was told that everything was OK and that the recommendations were fine. It is then that I realised that it was not about the software. It was about the longterm value of the information and how it is presented to protect libraries and make it easy for them to integrate it with their existing catalogue.

After a few more letters I received written confirmation that the recommendations were accepted. I then had to wait for the release of OpenOffice.org 1.1

While waiting I decided that I was going to donate the CD's to all the Public Libraries in Scotland. There are 507 of them. The reason is that to have any real affect I needed to have something big happen. It was also necessary so that a small group of Libraries would not be threatened by removal of funding/donation from private sponsors that disagree with their action.

I wrote an email to the head of all the libraries in the Scottish Parliament telling her what I was about to do. I received no reply so I requested that my local Member of Parliament send a letter. Which he kindly did. I still did not receive any response so I took the letter of acceptance and some sample Cd's and sent them to a magazine called Library and Information Update. This magazine goes out to all the professional Librarians in the UK. I managed to get an article in the magazine and shortly afterwards I received a contact from the Head of the Advisory board to the Scottish Executive. (The Scottish Executive. This is the very top committee in Scotland for government). The Advisory board is called SLIC (Scottish Library and information Council). This is a different council than that for England which is called CILIP(Chartered Institute of Library and Information Professionals). For those of you that are a little confused Scotland is a separate country from England. (United Kingdom, Scotland,Northern Ireland,Wales,England).

The Head of the Scottish Library and information council was furious with me and the Magazine. The reason was she believed that I was donating the software to be installed on their Library computers. One of my previous jobs was Application Specialist to North and South America for Universal Music Group. My job was to create packages of applications that could be deployed over approximately 8000 computers over 8 countries. It is immensely expensive to change that number of computers. Imagine converting a computer for a member of your family, realise how difficult that is and multiply it 8000 times. The reason that I mention this is because this is what the Head of the Scottish Library and information Council thought I was asking her to do. She was justified in being upset. She was also concerned about piracy. When I told her that I had and still do not have any intention to get the software installed on any library computer and gave her some information of the General Public License that she realised what I was doing. I would like to give

her credit for understanding very quickly that what I was trying to do was donate a CD that people can borrow. Just like a book.

An E-mail went out to all the Regional Heads of Libraries in Scotland. The reaction was mixed, most were positive, but some had reservations. Most would accept the CD's but others already had projects they had been working on for some time promoting other software. This would have added complexity and expense to those projects and in these cases the CD's were politely declined. Where the CD's were not accepted they may have accepted Posters with information about Open Source programs. They would accept poster that promotes a range of programs not just one. Something like OpenOffice.org, Abiword, Gnumeric, TheOpenCD, FreeDuc, Gimp, Audacity. This is because they need a balance of lots programs to keep their neutrality.

The ISO is released

I had also decided to add some documents to the original ISO that I downloaded from www.OpenOffice.org. This is because I was doing something where I was aiming for a very specific market.

I added The Universal Declaration of Human Rights – Which states

Article 26

Everyone has the right to education, Education shall be free, at least in the elementary and fundamental stages.....

Article 27

Everyone has the right freely to participate in the cultural life of the community, to enjoy the arts and to share in Scientific advancement and its benefits....

The Universal Declaration of Human Rights is a very important document. It is also much shorter than this one. I recommend that everyone read it. By adding a document it changes the CD. Instead of being just software, It gives the user the opportunity to study the document, to analyse and create theiry own thoughts about it and then share that with other people. It also opens the door to the creative commons and excellent resources such as the Gutenberg project.

I included the Marketing materials for OpenOffice.org 1.1. because I wanted to make it easy for anyone that enjoys the software to tell other people about it.

I included my recommendations for open source Software in Libraries because I wanted them to be read by the Librarians so that they could have an starting place for further discussion with other Open Source Advocates.

I also included the source code. The source code took up a large amount of space but it is very important for Libraries to have this. Fundamental to Libraries is that they allow people to learn, to Study , to gain access to information. The source code is large and is extremely difficult to download if you have a poor Internet connection. This excludes a large proportion of the population from getting access to it. With Broadband connectivity in Scotland between 5-10% it excludes 90% of the population. Everyone in Scotland has access to a Library. By giving the source code it is the equivelent of giving a car mechanic not only the book about a car but the car as well. This will hopefully mean that we have more programmers helping with upgrading the software.

The CD that I created was was thoroughly scanned by Norton Anti virus and Macaffee virus

scanners. I also installed the software on several different computers running Windows 98, Windows 2000, Windows XP, Linux and Mac OSX

The Lending CD is made

While the total number of Libraries that wished to receive the CD were being collated and their address labels printed by SLIC, I started making the CD's. I found a manufacturer of pressed CD's, created the cover letter and cover for the DVD case. Found a supplier of DVD cases, Checked out postage rates, Suppliers of envelopes, Found printers that would print the flyers and cover letters. I added the phrase "Library and Open Source Communities Sharing Knowledge" to the CD design. I found out if it was whether it was cheaper to get the packages put together or with help from volunteers. As always the greater the numbers the Cheaper price per unit so I decided to send them to all the libraries in the UK.

At this point you will be asking where did I get the money from. The answer is that I paid for it all myself. I had decided that the only way that my idea would stand a chance of being recognised would be if there was large acceptance of open source CD's in Libraries. This would cause a big enough splash so that libraries, Vendors, Distributors would take notice. The benefits to Government, The open Source community, the public are are I believe quite apparent. There is money to be made because Libraries have unique needs. I hope that my gesture will allow large organisations to start talking and listening to each other. Especially Libraries and the Open Source communities. To continue this project you don't need any money. You only need to persuade open Source CD vendors to sell their CD's with a different cover design, persuade a library to make their own or local government to provide them. If you have definite proof that they are available in other libraries then there is no reason why they shouldn't be available in yours. It will only take one librarian in one library to accept a CD for others to follow. You may also request that a computer magazine creates a CD in an acceptable format and then when you buy the magazine you donate the CD to your local library. To Repeat. All they need to do is print a different cover for the CD.

The first set of CD's were sent out and I delivered as many as I could by hand. This was to allow me to get feedback and a reaction. Again each was different, from great enthusiasm, to intrigue or scepticism. It was then that I realised that the greatest thing that I could really hope for was to spread knowledge of the General Public License, understanding copyleft was the only thing that I can definitely achieve. Give people a choice and they will look at that choice.

Waiting

After the CD's were delivered I had to wait. It can take 4-5 weeks for a book or CD to go through the individual library system before it gets placed on the Online Catalogue. When I finally started to see them appear I knew that they had been accepted officially. I then took the mailing labels for the rest of Britain and posted out the final 3500 CD's. On the cover letter I pointed to some of the libraries that had already accepted the CD. It would have taken me too much time to go through the bureaucracy of Libraries for the rest of the country. I decided to get as much publicity as possible and for the CD's in Scottish Libraries and then just donate them to as many librarians as possible to give them a choice and to allow discussion it amongst themselves.

Ending

My part of this project is now nearly complete. An idea is nothing unless it is put into action. It is up to you now if you wish to build on this idea.

I will be finishing with this project after I have donated copies of TheOpenCD, GNUWIN II

and FREEDUC to the libraries of Scotland.

The Beginning

I will then be moving on to my next project. The Barnbuilding Project. The aim is simple. To supply every single school pupil in the whole of Scotland with Open Source Software. Completed with no funding needed by the end of next year and replicable anywhere. If you would like to do this in your area then look out for my post in January.

Associated Documents

A) Open Source Cd's for Libraries recommendations

B) Open Source Cd's for Libraries recommendations Explanation

C) Example DVD Cover for OpenOffice.org 1.1

D) Open Source Lending CD Distribution Network

A)

Open Source CDs for Libraries Recommendations

The purpose of this document is to act as a starting point for discussion for recommendations to the Open Source community and vendors. What is appropriate and acceptable format for open source media in libraries? Libraries throughout the world need to be able to easily catalogue and define the stock within the library. No library wants to be overloaded with stock that holds no easily acceptable value or has a short lifespan.

It occurs to me that libraries should make the following recommendations

1. Where possible the CD cover should follow the guidelines set out in the ISBN Users Manual published by The International Standard Book Number System Agency, (International Edition).

2. On the cover of the CD there should be a clearly printed disclaimer which should read:

The Library that you borrowed this CD from will not give any technical support for this software. It must be clearly understood that attempting to install this software on any Library computer by a member of the public is not allowed.

This disc has been thoroughly scanned and tested at all stages of production, but - as with all new software - we still recommend you run a virus checker before use. We also recommend that you have an up-to-date backup of your hard drive at all times.

(Name of all parties concerned) and/or the Library that you borrowed this CD from cannot accept responsibility for any disruption damage and/or loss to your data or computer system that may occur while using this CD, the programs and data on it. Consult your network administrator before installing any software on a networked PC.

3. All CD's must be pressed or high quality CD's and not CDR or CDRW. This is due to the durability of the media and the possibility that a member of the public will replace an original CD-R with a CD with malicious content.

4. Libraries would prefer that Open Source CD's were supplied in DVD covers. DVD covers are easier to shelve and less prone to break.

5. The library cannot endorse any product. Advertising on the cover to an unconnected third

party is not acceptable.

6. A valid and respected vendor of replacement pressed CD's should be made known to the Library. Vendors must make every effort to eliminate any viruses in the software.

7. Only major releases of single applications, small valid groupings of applications, distributions, and compilations of special merit will be considered for the library catalogue. Large compilations of Open Source software that have a likely lifespan of less than 3 months may be kept in the library at the librarians discretion but will not be entered into the catalogue.

8. Commercial Distributions of Open Source Software (e.g. RedHat, SUSE, Lindows, Xandros) must state their companies' position concerning their software in Libraries. If their distribution is allowed, not allowed, if past official releases of their software can be bought and lent out in libraries, if their distribution will only be available on the companies own magazine etc. This should be stated on the companies website.

9. Libraries cannot accept donations of Open Source software from any Political parties

10. Vendors of the CD will be chosen by recommendations of the original distribution/application. The choice will also be based on quality, adherence to the Library recommendations and how much the vendor helps the originating open source project.

11. The CD whenever possible should contain the source code.

Further thoughts or comments welcome.

In the previous document CD and DVD are interchangeable

<u>B)</u>

Open Source CDs for Libraries Recommendations Explanation

The purpose of this document is to act as a starting point for discussion of an open standard to the Open Source Community, Open Source Software vendors and Library communities. What is appropriate and acceptable format for open source media in libraries? Libraries throughout the world need to be able to catalogue and define the stock they hold. They do not want to be overloaded with stock that holds no value or has a short lifespan. Vendors need to know what library customers want. The Open Source communities need a method of distributing and sharing their programs.

Due to the non-centralised structure of Libraries, vendors and open source communities, recommendations are a good start before International standards are created.

It occurs to me that libraries should make the following recommendations

1. Where possible the CD cover should follow the guidelines set out in the ISBN (International Standard Book Number) Users Manual published by The International Standard Book Number System Agency, (International Edition). This manual is available online.

Explanation: The benefits of having an ISBN are that it will make it much easier for libraries to catalogue the CD. It will also aid to selling the CD in bookshops.

The main reason for this is to allow the use of an ISBN number with the CD.

International Standard Book Numbers can only be associated with books and not for software. Books however can have software added in as an extra gift at the back of it. An example of this is OpenOffice 1.0 Resource kit by Solveig Haugland, Floyd Jones (ISBN 0-13-140745-7)

Books are also allowed to be printed in electronic form, therefore a CD with an electronic book and a free gift of software will be valid, with the understanding that the ISBN number is only associated with the electronic book/PDF. A book can only receive an ISBN number if the book edition remains the same for at least one year.

On the back cover of the CD there should be the ISBN and a space for the bar code. The publisher and printer should also be shown. For example the publisher may be <u>www.openoffice.org</u> and the printer will be the vendor of the CD.

If the CD does not have an electronic book/PDF that has an ISBN then the white space reserved for the Bar code should be left blank to enable a space for libraries to put in their own catalogue number.

2. On the cover of the CD there should be a clearly printed disclaimer which should read:

"The Library that you borrowed this CD from will not give any technical support for this software. It must be clearly understood that attempting to install this software on any Library computer by a member of the public is not allowed.

This disc has been thoroughly scanned and tested at all stages of production, but - as with all new software - we still recommend you run a virus checker before use. We also recommend that you have an up-to-date backup of your hard drive at all times.

(Name of all parties concerned) and/or the Library that you borrowed this CD from cannot accept responsibility for any disruption damage and/or loss to your data or computer system that may occur while using this CD, the programs and data on it. Consult your network administrator before installing any software on a networked PC".

Explanation: This is to ensure that the lender realises that under no circumstances does any library have any liability for anything that happens when the software is installed by the lender.

3. All CD's must be pressed or high quality CD's and not CDR or CDRW. This is due to the durability of the media and the possibility that a member of the public will replace an original CD-R with a CD with malicious content.

Explanation: The libraries must be able to make sure that the CD that they lend out is exactly the same one that they receive back.

4. Libraries would prefer that Open Source CD's were supplied in DVD covers. DVD covers are easier to shelve and less prone to break.

Explanation: Normal CD jewel cases are a huge amount of work for Libraries due to breakages, DVD cases can contain larger introductory pamphlets and do not need special shelving considerations which are an extra expense for Libraries

5. The library cannot endorse any product; Advertising on the cover to an unconnected

third party is not acceptable.

Explanation: Just like books Library products must be consistent. The cover must describe the contents of the CD

6. A valid and respected vendor of replacement pressed CD's should be made known to the Library. Vendors must make every effort to eliminate any viruses in the software.

Explanation: CD's tend to be scratched easily. A replacement of an exact copy original needs to be available. Updated versions of the CD will mean that the CD will need to be recatalogued. A CD with a shelf life of one year will be beneficial to libraries (consistency) and vendors (stock control)

7. Only major releases of single applications, small valid groupings of applications, distributions, and compilations of special merit will be considered for the library catalogue. Large compilations of Open Source software that have a likely lifespan of less than 3 months may be kept in the library at the librarians discretion but will not be entered into the catalogue.

Explanation: Quality, consistency, clarity of products. Open source software changes frequently, it would be impossible for libraries to keep up with the ever-changing world of open source software. Libraries hope to provide a snapshot of this process. New versions of the software can be bought from vendors or downloaded from the web. Major releases of software on a yearly cycle would be welcome in libraries. Vendors may consider open source CDs available in libraries as a threat to their business model. It must be pointed out that books are be available in libraries but can still be bought in bookshops and online. The general public will still buy the software even though it is available in libraries. Buyers will also prefer to get the most up-to-date software available.

8. Commercial Distributions of Open Source Software (e.g. RedHat, SUSE, Lindows, Xandros) must state their company's position concerning their software in Libraries. If their distribution is allowed, not allowed, if past official releases of their software can be bought and lent out in libraries, if their distribution will only be available on the companies own magazine etc. This should be stated on the companies website.

Explanation: There are many commercial versions of open source software. To be able to track all the different business models associated with these companies would be very difficult for librarians who generally only touch on this subject briefly. Commercial businesses that wish to extend into this new market must make it clear exactly what their licences are.

9. Libraries cannot accept donations of Open Source software from any Political parties.

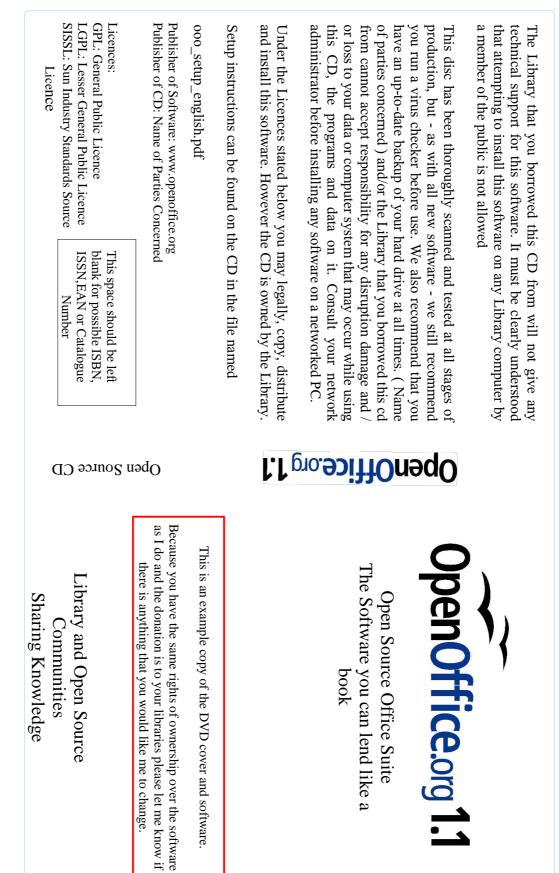
Explanation: Libraries are apolitical: donations from private individuals, companies, and non-political groups are acceptable

10. Vendors of the CD will be chosen by recommendations of the original distribution/application. The choice will also be based on quality, adherence to the Library recommendations and how much the vendor helps the originating open source project.

Explanation: This is at the discretion of the originating site

11. The CD whenever possible should contain the source code.

C) Example DVD cover



Open Source Lending CD Distribution Network

