



# BOOK INDUSTRY STUDY GROUP

Annual Report 2007-2008

“Working to create a more informed, empowered and efficient book industry.”





# ANNUAL REPORT 2008

FISCAL YEAR ENDING JUNE 30, 2008



*Working to create a more  
informed, empowered and efficient  
book industry.*

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## A LETTER FROM THE CO-CHAIRS

Dear BISG Members,

As you will see from this Annual Report, this fiscal year was another successful and productive one for the Book Industry Study Group. Our organization continued to grow and to reflect the diversity of our industry in the breadth of its membership. Our wide variety of programs, publications and events helped us attract twenty-six new companies into membership from all parts of our industry—booksellers, publishers, printers, technology providers and libraries—and we welcome the involvement of these new members in all aspects of BISG’s work. Thanks to the help of these new members and the renewed support and loyalty of existing ones, we are pleased to report that BISG continues to enhance the strong financial position it has developed over several years and its position as a respected part of our industry.

Innovation was a key theme in much of BISG’s work in the past year. The organization began to define and extend its role in digital publishing by addressing important supply chain issues such as standards for searching and discovering online book content, identifying and describing digital publications and tracking technology-led

experiments in publishing and bookselling. We expect this new and fast-growing area of our industry will continue to be an important focus for BISG in the years ahead. BISG published a major new study—the first of its kind—in 2007–2008. *Environmental Trends and Climate Impacts*, a groundbreaking work on the environmental impact and performance of our industry, attracted huge interest and support from across the industry, reflecting the widespread concern in many companies about issues of environmental stewardship and responsibility.

Innovation was also apparent in areas of more traditional interest to BISG. The organization introduced two new certification programs—in product data and product labeling—to encourage and support compliance with standards and best practices. And our annual conference, *Making Information Pay*, was re-designed to encompass a survey and publication on innovation and experimentation in the book industry.

Our success in the past year was due to the commitment of time and expertise by hundreds of volunteers from member companies. On behalf of the Board of Directors and the staff of

BISG, we would like to take this opportunity to thank everyone who was active in BISG's work in 2007–2008. With our industry facing challenging economic conditions in the year ahead, BISG's mission has never been more important and relevant. Continued success depends on

the active involvement of members in the various committees and working groups organized by BISG. We encourage all member companies to participate fully in these forums and to contribute to the development of BISG's many programs and initiatives.

Sincerely,



Dominique Raccah  
Publisher and CEO  
Sourcebooks, Inc.



Andrew Weber  
Senior Vice President  
Operations and  
Technology  
Random House, Inc.



*Dominique Raccah*



*Andrew Weber*

## A LETTER FROM THE EXECUTIVE DIRECTOR

Dear Members,

For the Book Industry Study Group (BISG), 2007–2008 was a year of fidelity and innovation.

The organization remained faithful to its founding mission to promote and enable a more efficient industry through standards, best practices, research and information, and we pursued a wide range of initiatives—documented in this Annual Report—to fulfill that mission. But as our industry changes, it is vital for BISG to innovate and in 2007–2008 we branched out in several new directions.

In many areas of our work, we reflected the industry's growing interest in the opportunities offered and challenges posed by digital publishing and distribution. We developed web services standards to support the discovery of digital content, stimulated industry-wide discussion about how digital publications should be identified, contributed to international standards on how such products should be described in the supply chain and documented the extraordinary levels of technology-driven innovation and experimentation we see in our industry.

We responded to the growing interest in environmental issues by publishing a groundbreaking report measuring the carbon footprint of our industry and documenting the ways in which many companies are leading efforts towards greater environmental responsibility. Our work in this important area was acknowledged by extraordinary levels of support from members and by numerous invitations to present our findings to the industry at large, both in the U.S. and overseas.

In another important new departure for BISG in 2007–2008, we encouraged the industry to adopt standards and best practices by introducing independently monitored certification programs in product data and product labeling and we announced the first successfully certified companies under both programs.

The balance we sought to achieve between change and continuity and innovation and tradition has been validated in the success we have achieved. The financial position of the organization has been strengthening over many years and in 2007–2008 we strengthened it further by

exceeding our budget targets for revenue and operating income and by growing our assets. A steady stream of new members and the continued support of existing ones made much of this possible, but it is also important to note the record levels of sponsorship we attracted for our events and publications. Such support, from members and non-members alike, is evidence that our work reflects the interests and needs of the industry we are here to serve.

Our achievements in the past year were possible only because of the extraordinary levels of participation and support from hundreds of individuals from member companies in our committees, interest groups and project teams.



*Michael Healy*

Every initiative, publication and event is the result of enthusiasm and hard work behind the scenes by these volunteers and again this year I want to record my sincere thanks for all their efforts on BISG's behalf. We have ambitious plans for the year ahead and will be relying again on this generous support.

Recessionary influences in the wider economy may make 2008–2009 a challenging year for the book industry. As trading conditions get tougher, BISG's mission to drive higher levels of industry-wide efficiency through standards and best practices becomes even more relevant and urgent. I look forward to working with all our members in the year ahead as we strive to influence the conditions for a successful and prosperous industry going forward.

Best wishes,

A handwritten signature in black ink that reads "Michael Healy". The signature is written in a cursive style and is positioned above the printed name and title.

Michael Healy  
Executive Director  
Book Industry Study Group, Inc.

## BISG: A STRONG AND GROWING ORGANIZATION

### Financial Results 2007-2008

The audited financial statements, prepared by McGladrey & Pullen LLP, demonstrate that BISG's financial position continues to be healthy and robust. Key highlights from the year ending June 30, 2008 include the following:

- Total revenue grew by 23% year-on-year to \$839,149
- Total revenue exceeded budget by 10% and revenue in almost all categories (membership, sponsorship and publications) was higher than budgeted
- The organization achieved a surplus of \$63,431, exceeding the budgeted surplus of \$30,100
- Assets grew by nearly 11% year-on-year to \$645,165



### Summary Results 2007-2008

<b>Book Industry Study Group, Inc</b>	
Statements of Cash Receipts & Disbursements	
Year ended June 30, 2008	\$
Cash receipts:	
<b>Membership dues</b>	614,328
<b>Publications, programs and events</b>	176,925
<b>Other receipts</b>	47,896
<b>Total</b>	<b>839,149</b>
Cash disbursements:	
<b>Publications, programs and events</b>	121,344
<b>BISAC expenses</b>	18,341
<b>Office services and operating expenses</b>	636,032
<b>Total</b>	<b>775,718</b>
<b>Excess of cash receipts over disbursements</b>	<b>63,431</b>

## Membership 2007-2008

Twenty-six new members joined BISG in 2007–2008. New publisher members included Crossway Books and Perseus Books Group, as well as two university presses, MIT and Pace University. Among the year's other new members were the Association of Canadian Publishers, the Educational Paperback Association, LibreDigital, On Demand Books and the Southern Independent Booksellers Alliance.

BISG was also pleased to welcome Books-A-Million and Scholastic back to membership in 2007.

Fifteen members did not renew in 2007–2008, many because of recessionary influences. Among them were AbeBooks and Thomas Nelson, as well as three libraries, Anne Arundel County Public Library, California State Library and James J. Hill Reference Library.

## Staffing and Administration

After three years at BISG, the organization's Associate Director, Angela Bole, left in November 2007 to take up a position elsewhere. Angela was replaced by Karen Forster, who started with BISG in December 2007.

Following a steam pipe explosion in July 2007 outside BISG's offices at 370 Lexington Avenue, the organization was required to evacuate for a period of five weeks. The Directors and staff of BISG thank David Young and Phil Madans of Hachette Book Group USA for providing BISG with temporary office facilities during the evacuation period. Although the explosion did not damage the office, equipment, records or

## Board of Directors

At the BISG Annual Meeting of Members held in New York City on November 6, 2007, the following individuals were elected to the BISG Board of Directors for a three-year term:

- Gary Aiello: COO, R.R. Bowker
- Tina Jordan: Vice President, Association of American Publishers
- Anne Lloyd Davies: CIO, Simon & Schuster
- Sally Dedecker: President, Sally Dedecker Enterprises
- Ted Hill: President, THA Consulting
- George Lossius: Group CEO, Publishing Technology, Inc.
- Rick Schwartz: CIO, HarperCollins Publishers
- Jean Srnecz: Senior Vice President, Merchandising, Baker & Taylor, Inc.

At last year's Annual Meeting, members also approved the appointment of two new officers. Kelley Maier, Senior Vice President, Product Management & Marketing, Ingram Book Group, was appointed Vice-Chair (to replace Boris Wertz); David Walker, industry consultant, American Booksellers Association, was appointed Treasurer (to replace Jan Nathan).

At subsequent meetings throughout the year, the Board of Directors was pleased to welcome the following new directors:

- Florrie Binford Kichler: Board President, Independent Book Publishers Association (to replace Jan Nathan)
- Susan Harwood: CIO, Borders Group, Inc. (to replace Mark Palmucci)
- Allen Noren: Director of Online Marketing, O'Reilly Media, Inc.
- Tom Turvey: Director, Google Book Search Partnerships, Google

The Board of Directors also accepted the resignation of Robert Baensch, Associate Professor, New York University, and would like to thank him for his contributions.

A full list of the Board of Directors, the Executive Committee and the Officers as of June 30, 2008, can be found in Appendix 1 of this report.

data, the emergency highlighted the organization's vulnerability in such circumstances. New offsite data storage routines were established in the wake of the incident and BISG thanks the staff of Random House, Inc., for their help in establishing and maintaining the new procedures.

BISG is committed to ensuring that the technical infrastructure that supports its members and activities is robust and efficient. A new server was installed this year and our web hosting service was changed and upgraded. In addition, the Board of Directors has made funds available in the budget for fiscal year 2008–2009 to redesign and upgrade the BISG website.

## Budget 2008-2009

The Board of Directors has approved the organization's budget for fiscal year 2008–2009. In view of the recessionary pressures within the economy overall and the uncertainty about the extent to which these pressures will affect the book industry, the Board believes it is appropriate for BISG to be cautious in its revenue expectations for 2008–2009. The new budget targets revenue of \$767,000, only 1% higher than the budgeted figure for 2007–2008. The Budget also reflects the Board's view that after several years of surpluses and with a healthy balance sheet, the time is right for BISG to make prudent investments that will allow the organization to develop in future years. It has therefore approved the addition of a fourth full-time staff position from October 1, 2008, the introduction of a 401K program for all staff and the funds necessary to complete the redesign of the BISG website. These assumptions about revenues and expenses are reflected in a projected deficit of approximately \$58,000 in 2008–2009.

The summary budget for 2008–2009 is reproduced below. More detailed budget information is available to members from the BISG office.

<b>Book Industry Study Group, Inc.</b>	
<b>BUDGET 2008–2009</b>	
<b>Ordinary income (\$US)</b>	
<b>Membership dues</b>	560,000
<b>Publication sales</b>	68,000
<b>Program fees</b>	35,000
<b>Interest and misc.</b>	15,000
<b>Sponsorships</b>	78,000
<b>Shipping and handling</b>	1,000
<b>Education fees</b>	10,000
<b>Total income</b>	<b>767,000</b>
<b>Cost of goods sold</b>	205,000
<b>Gross profit</b>	562,000
<b>Total expenses</b>	620,235
<b>Net surplus/deficit</b>	<b>(\$58,235)</b>

## KEY ACTIVITIES AND MILESTONES

### Publications

#### *Book Industry TRENDS 2008*



BISG published the 2008 edition of *Book Industry TRENDS* in July 2008.

Like previous editions, *TRENDS 2008* was prepared by the Institute for Publishing Research with additional information provided by Info-

Trends on the market segment comprising companies with annual revenues of up to \$50 million. Articles were contributed by Stephanie Oda and Glenn Sanislo of Open Book Publishing.

Also as in previous years, the release of *TRENDS 2008* attracted significant coverage from media such as *The New York Times*, Associated Press, *Publishers Lunch*, *Publishers Weekly* and *Shelf Awareness*.

*TRENDS* was again made available in both printed and electronic forms. Single-user and multi-user PDF versions were released simultaneously with the printed edition. BISG is grateful to R.R. Donnelley and Coral Graphics for their generous donations of time and various production services.

As part of continuing efforts to improve the publication, the Board of Directors approved a review of how *TRENDS* is compiled and produced. A *TRENDS* Advisory Group was established, chaired by Judith Appelbaum of Sensible Solutions and made up of publishers, booksellers and industry journalists, to conduct this

review. The group's recommendations were approved by the Board in May 2008 and important changes now underway will be completed in time for the publication of the 2009 edition.

#### *The Identification of Digital Book Content*

In January 2008, BISG published a discussion document in cooperation with Book Industry Communication in the UK. *The Identification of Digital Book Content* explores the issues relating to how ebooks and other electronic book content should be identified in the supply chain in order to support discovery, sales and reporting. The discussion document, written by Michael Holdsworth, an industry consultant and former Managing Director of Cambridge University Press, followed a special meeting coordinated by BISG and held at BookExpo America 2007.

The document is intended to stimulate debate in the industry about how digital book content should be identified and to encourage further work on the development of standards in this area. The issues it raises are being addressed in the BISAC Identification Committee and it is intended that BISG will develop best practices guidelines in this area before the end of 2008. BISG wishes to acknowledge the generous support of R.R. Bowker and Nielsen BookData in the publication of this document.

## *Environmental Trends and Climate Impacts: Findings from the U.S. Book Industry*



BISG, working in collaboration with Green Press Initiative (GPI), published *Environmental Trends and Climate Impacts: Findings from the U.S. Book Industry*, in March 2008. The report was the cul-

mination of a project started in mid-2007 and included a major survey of companies' environmental attitudes, policies and practices. It was guided by a special Subcommittee of BISG's Research Committee, chaired by Tyson Miller of GPI, and generously supported by many companies (acknowledged for their support in Appendix 3 of this report).

*Environmental Trends and Climate Impacts* was the first publication to attempt a systematic calculation of the book industry's carbon footprint. The report presents the findings of the BISG/GPI survey, gives examples of industry good practice, provides an endangered forest risk assessment, summarizes the science of climate change and sets out a series of recommendations about how companies can improve their environmental performance.

BISG proposes to continue its involvement in this area and to explore opportunities for the development of standards and best practices for the industry. BISG has become a founding member of the Book Industry Environmental Council, an organization committed to raising awareness of environmental issues in the book industry and to improving performance.

## *BISAC Subject Codes 2007 Edition*

The *BISAC Subject Codes 2007 Edition* was published and distributed to BISG members on October 23, 2007.

Several major changes were implemented in the 2007 edition. In response to requests from representatives of the religious publishing sector, the BISAC Subject Codes Committee worked for several months to revise the Bibles section. In addition, the Committee substantially updated the Comics and Graphic Novels and Technology sections, and it continued incorporating responses to some of the numerous change requests triggered by the increased visibility of the BISAC code list on the BISG website.

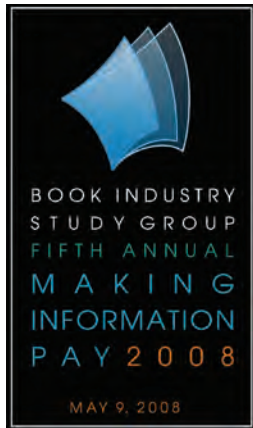
Following the successful publication of the 2007 edition, the BISAC Subject Codes Committee immediately began work on a 2008 edition, which will be published in fiscal year 2008–2009.

## *From Experimentation to Innovation in the Digital Age*

Released in May 2008 to coincide with BISG's Making Information Pay 2008 conference, *From Experimentation to Innovation in the Digital Age* presents ten case studies first identified through a major survey on innovation conducted by BISG and The Idea Logical Corporation earlier in the year. In addition to the case studies, the publication presents the survey findings. It was distributed for free to those who attended Making Information Pay 2008, and is available on the BISG website. BISG thanks John Wiley & Sons, Inc. and Deloitte Consulting LLC for support that made this publication possible.

## Events

### Making Information Pay 2008



This year's Making Information Pay conference was held in the McGraw-Hill Auditorium in New York City on May 9, 2008. It was moderated jointly by Michael Healy of BISG and Mike Shatzkin of The Idea Logical Company and was sponsored by Publishing

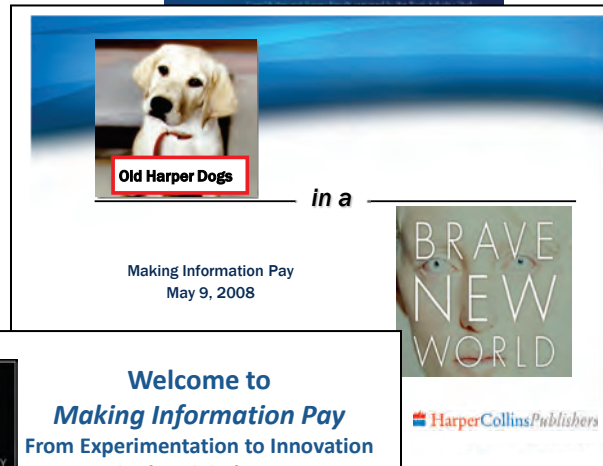
Technology, Deloitte Consulting LLC, Nielsen BookScan, Microsoft Live Book Search and John Wiley & Sons, Inc. This year's conference took as its theme "From Experimentation to Innovation in the Digital Age" and the event was preceded by a major industry survey of attitudes towards experimentation and innovation, conducted by BISG and The Idea Logical Company.

Nearly 300 key industry executives—including publishers, distributors, wholesalers and retailers—joined speakers as they shared their views on the roles experimentation and innovation have played in the development of their businesses in an increasingly digital industry. Special thanks are due to our presenters: Michael Raynor (Deloitte Consulting LLC), Carolyn Pittis (HarperCollins Publishers), Michael Cader (Publishers Marketplace), Todd Anderson (University of Alberta Bookstore), Malle Vallik (Harlequin Enterprises), Gwen Jones (John Wiley

& Sons, Inc.), Julie Grau (Spiegel & Grau, Random House, Inc.), and Neil De Young (Hachette Book Group USA).

For more information, as well as copies of the presentations, please visit the BISG website:

[http://www.bisg.org/conferences/mip5\\_program.html](http://www.bisg.org/conferences/mip5_program.html)



## BookExpo America 2008

BISG organized or participated in five sessions for industry professionals at BookExpo America 2008 in Los Angeles.



- **Raising the Standard of Product Information: BISG's New Certification Program for Publishers**

This well attended session was led by panelists who shared their insights into the importance of high-quality product data for effective supply chain management and better book sales. The session also summarized the main features of BISG's Product Data Certification Program, introduced in February 2008.

Special thanks to our speakers: John Helmus (John Wiley & Sons, Inc.), Jean Srneck (Baker & Taylor, Inc.) and George Tattersfield (Ingram Book Company).

- **Digital Books and the Standards for Identifying, Describing and Trading Them**

Throughout 2007 and 2008, BISG has been extensively involved in helping to develop a standards infrastructure to support greater efficiency in the emerging digital supply chain. This session highlighted many key initiatives in this area, including the ongoing development of ONIX 3.0, the efforts to prepare best practices in the numbering of digital products, and the work to develop web services standards for discovering digital book content.

Special thanks to our speakers: Kent Freeman (Ingram Digital Group) and Michael Holdsworth (independent consultant).

- **Bridging the Gap between Publishers and Librarians: Standards to Help Manage Licenses**

As the delivery of information moves to a digital environment, libraries' use of publisher content is increasingly governed by licenses. Managing rights and requirements is a growing burden and can impact how quickly and easily content can be accessed and purchased. This session, organized jointly by BISG and NISO (National Information Standards Organization), explored how publishing and library communities are cooperating to make information about contractual rights and responsibilities easier to access, understand and use.

Speakers included Judy Luther (Informed Strategies), Rick Burke (Statewide California Electronic Library Consortium), Todd Carpenter (NISO) and Michael Healy (BISG).

- **Environmental Trends: Where Does the U.S. Book Industry Stand Today?**

BISG contributed to a session sponsored by Green Press Initiative that highlighted the main findings of the BISG/GPI report published in March 2008—*Environmental Trends and Climate Impacts: Findings from the U.S. Book Industry*.

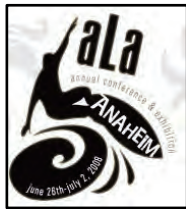
Speakers for this session included Andrew van der Laan (Random House, Inc.), Tyson Miller (GPI) and Michael Healy (BISG).

- **Book Industry TRENDS 2008—A First Look**  
A standing-room-only crowd listened to Professor Albert Greco and Michael Healy present the key findings from *Book Industry TRENDS 2008*.

BISG is grateful to Sally Dedecker, President of Sally Dedecker Enterprises, for her efforts in helping to organize these BookExpo America sessions, and to all those who presented at the sessions.

For more information, as well as copies of the presentations, please visit the BISG website:

[http://www.bisg.org/conferences/BEA\\_2008.html](http://www.bisg.org/conferences/BEA_2008.html)



### American Library Association Conference 2008

For the second consecutive year BISG worked with the National Information Standards Organization (NISO) to organize a seminar for librarians at the ALA Conference. Nearly 100 librarians attended this half-day program in Anaheim on “The Changing Standards Landscape: Creative Solutions to Your Information Problems,” moderated jointly by Michael Healy of BISG and Todd Carpenter of NISO. Speakers included Brian Green (International ISBN Agency), Angela D’Agostino (R.R. Bowker), Cliff Lynch (Coalition for Networked Information), Tina Feick (consultant) and Nathan Robertson (University of Maryland).

### Conference and Seminar Presentations in 2007-2008

In addition to our usual contribution to major events, BISG accepted invitations to organize or give presentations at the following conferences and seminars in fiscal year 2007–2008:

- Association for the Export of Canadian Books conference, Banff, September 2007: *“Data Standards—Past, Present and Future”*
- Library Binding Institute Fall Conference, Springfield, MA, September 2007: *“Book Industry TRENDS: Highlights from the 2007 Edition”*
- Printing and Writing Papers Association Conference, Vancouver, October 2007: *“The State of the Book Industry”*
- International Forum on the Creative Economy, Sao Paulo, December 2007: *“Transition and Transformation: The Impact of Digital Technology on the U.S. Book Industry”*
- BookNet Canada Tech Forum, Toronto, March 2008: *“Going Green in Black and White—Towards a Climate-Friendly Book Business”*
- London Book Fair, London, April 2008: *“Going Green—What Publishing is Doing to and for the Environment”*  
*“Digitization: International Solutions”*  
*“America’s Progress on Digitization”*  
*“Environmental Trends and Climate Impacts”*
- ECPA Leadership Summit, Dallas, TX, May 2008: *“Digital Publishing and Digital Distribution: Strategies and Experiences from Trade Publishing”*
- PMA University, Los Angeles, CA, May 2008: *“Selling More Books at Home and Abroad — and How BISG Can Help”*
- International Booksellers’ Federation Conference, Amsterdam, June 2008: *“From Basic to Virtual Bookselling—The View from the United States”*

## Programs

### Product Data Certification Program

Over many years BISG has played a leading role in raising awareness of the importance of accurate, timely and comprehensive product information. The BISAC Metadata Committee has contributed extensively to the development of ONIX, an international standard for describing and communicating product information, and has produced *Best Practices for Product Metadata*.



In 2007, the Committee decided to add a layer of certification to the standards and best practices work it had developed over many years by designing a certification program. Our Product Data Certification Program (PDCP), approved by the BISG Board of Directors at its meeting in November 2007, offers publishers the opportunity to submit a file of product information (in ONIX or in a templated Excel spreadsheet) to the BISG office and to have that file tested for the presence or absence of mandatory data elements. In addition, a certification panel comprised of representatives from Baker & Taylor, Inc., Barnes & Noble, Ingram Book Group, Library of Congress and R.R. Bowker provides structured feedback on the data quality of the file.

The BISG Product Data Certification Program, modeled on similar programs developed in the UK, Australia and Canada, was launched in February 2008. To date, the following companies have been certified: Hachette Book Group USA, Simon & Schuster, Waterford Press and John Wiley & Sons, Inc. Further certifications are planned throughout 2008. The program is open to all companies.

### Product Label Certification Program

Standards for directing the movement and identifying the contents of shipping containers are critically important for the efficient operation of the industry's supply chain. BISG first published its "Guidelines for Shipping Container Labeling" in September 2005, which provided the industry with standard shipping and product labels and guidance on how the labels should be prepared and used.



To encourage adoption of the standard product label, BISG launched the Product Label Certification Program (PLCP) in February 2008. Under its terms, the BISG office, supported by a number of experienced and qualified certification agencies, determines whether product labels companies submit are compliant with BISG and GS1 guidelines. The program is open to all companies.

Simon & Schuster was the first company to be certified successfully under PLCP. Other applications are being considered and further successful certifications will be announced later in the year.

## Warehouse Benchmarking

After the successful completion of two cycles of BISG's Warehouse Benchmarking Program in 2006 and 2007, the Distribution Executives Interest Group decided to delay the launch of a third cycle until a program review had been completed. The review, coordinated with Andy Johnson of Texas A&M University and involving previous and potential participants, was partly completed in 2007–2008 and a decision will be made in due course about re-starting the program.



## Environmental Trends and Climate Impacts

BISG partnered throughout 2007 with Green Press Initiative (GPI) to establish a baseline for tracking climate impacts and progress by the U.S. book industry in environmental improvements. This project, completed in March 2008, was approved by the Research Committee of BISG and endorsed by the Board of Directors. Under the program, BISG and GPI commissioned Borealis Centre—a leading research organization for the non-profit sector that specializes in environmental impacts in the chain of production—to produce a benchmarking survey and report on its findings. The findings were published as *Environmental Trends and Climate Impacts: Findings from the U.S. Book Industry* and publicized extensively in a series of conference presentations in the U.S., Canada and the UK.

The project was supervised by BISG's Environmental Benchmarking Subcommittee and generously sponsored by the following organizations: Association of American University Presses, Borders Group, Cascades Fine Papers Group, Hachette Book Group USA, HarperCollins Publishers, Ingram Book Group/Lightning Source, Malloy, Inc., Maple-Vail Book Manufacturing Group, Random House, Inc., Smerrillo Associates and Thomson-Shore, Inc.

## Education

### Affiliations

BISG maintains close relationships with a wide variety of other organizations in the U.S. and abroad whose work involves the U.S. book trade. It is especially important for BISG to monitor international developments.

This year BISG, through the BISAC Metadata Committee, contributed to the gathering of requirements for the next major release of ONIX, scheduled by EDItEUR for the fall of 2008. In addition, BISG participated in the EDItEUR meetings and the ONIX International Steering Committee Meetings at the Frankfurt and London Book Fairs.



Active participation in national and international standards bodies is an important aspect of BISG's work. In 2007–2008, Michael Healy and Richard Stark of Barnes & Noble (Chair of the BISAC Metadata Committee) continued as the official U.S. representatives to the International Organization for Standardization (ISO) committee developing the International Standard Name Identifier (ISNI). The ISNI was approved by ISO as a Committee Draft in 2008, thereby completing the first stage in its development as a formal international standard. Work is continuing and it is expected that ISNI will be formally ratified and published in 2009.

BISG strengthened its collaborative relationship started in 2007 with the National Information Standards Organization (NISO) by organizing two joint programs, one at BookExpo America 2008 and one at the American Library Association Conference, and by participating in one of a series of Thought Leader seminars that NISO runs.

## BISG COMMITTEE REPORTS

BISG's committees, interest groups and task forces provide an ongoing platform for the advancement of a wide array of industry activities, standards, guidelines and policies. Actively managed by our members, they meet regularly (usually bi-monthly) either in person or via conference call.

For more information about becoming involved in a BISG committee, interest group or task force, please contact the BISG Office at [info@bisg.org](mailto:info@bisg.org).

### Digital Standards Committee

*Chair: Leslie Hulse, HarperCollins Publishers*

The Digital Standards Committee began the past fiscal year under the Chairmanship of Kent Freeman (Ingram Digital Group), with Leslie Hulse taking over as Chairperson in early 2008. The Committee held several meetings and conference calls throughout the year, including three full-day working sessions. Using documents developed with the Association of American Publishers (AAP) Subcommittee for Books Online as a springboard, the group aimed to complete a first draft of the Technical Specification.

In May 2008, Leslie Hulse and David Mandelbaum of Barnes & Noble presented version 1.7 of "Standardizing the Discovery of Digital Book Content" to the BISG Board of Directors. The Board approved the draft standard, allowing organizations within the Digital Standards Committee to begin coding against and testing the transactions outlined within the document. This proof of concept phase is ongoing and is expected to be completed this fall.

During its June 11, 2008 meeting, the Digital Standards Committee also began preliminary discussions about the development of web crawl standards, and it plans to explore this further over the course of the next year.

## Distribution Executives Interest Group

*Chair: Craig Bauer, Houghton Mifflin Company*

The Distribution Executives Interest Group has focused primarily on the following initiatives:

### **Warehouse Benchmarking**

This project went on hiatus while the group considered a third cycle and looked at ways to optimize the results of the previous two cycles. It was agreed that the program still had merit and that more of the major warehouses needed to be involved. Focus groups were recruited in order to look at the viability of the program and suggest improvements, and Andy Johnson from Texas A&M was engaged to run the focus groups. DEIG will decide on the direction of the program this fall, and make a decision as to whether or not to run a third cycle.

### **Product Label Certification Program**

The Product Label Certification Program (PLCP) was formally launched, with Simon & Schuster becoming the first company certified under the program. Submissions have also been received from R.R. Donnelly, Random House and Thomas Nelson, and they are currently in process.

### **Revised Guidelines for Shipping Container Labeling**

Additional information was drafted and approved for labeling of multi-volume sets. A recommendation was also made for horizontal label placement, although the decision was taken not to include it in the Guidelines because it does not adhere to strict best practices.

## Manufacturing Executives Interest Group

*Chair: Ira Carrel, Barnes & Noble*

The Manufacturing Executives Interest Group (MEIG) continued to work on the priorities outlined late in the previous year. First and foremost was the development of Advanced Ship Notices (ASNs) for X12, version 5030. Thomas Smith of Simon & Schuster led the ASN subcommittee and completed work on the following messages, which were circulated and approved by the BISG Board in March 2008:

- 856 Advance Ship Notice
- 940 Warehouse Shipping Order
- 945 Warehouse Shipping Advice

Drafts of the following message sets are currently circulating for BISG member approval:

- 810 Invoice
- 812 Credit/Debit Adjustment
- 820 Payment Order/Remittance Advice
- 204 Motor Carrier Load Tender
- 211 Motor Carrier Bill of Lading
- 214 Transportation Carrier Shipment Status

Print-on-demand (POD) was another priority issue for the group, and Committee discussions have centered on how to inform and instruct BISG's constituency on best practices. At a meeting held on June 18, 2008, participants shared their recent experiences with POD, and discussed technological advances in the process.

Also at the June 18 meeting, there was approval to explore further an initiative pertaining to social accountability standards for book products. This initiative will involve creating standards to govern working conditions within the book supply chain, especially with regard to overseas operations, and setting up an auditing and certification program to support the standards. Participation in the program will be voluntary. The next steps are to gauge interest among Committee members' companies, and to create a BISG survey to investigate further member interest.

## Publications Committee

*Chair: Judith Appelbaum, Sensible Solutions*

As part of the continual process of strengthening *Book Industry TRENDS*, the new *TRENDS* Advisory Group prepared for the 2009 edition while the Publications Committee worked on *TRENDS 2008* as well as *The Identification of Digital Book Content* and *Environmental Trends and Climate Impacts: Findings from the U.S. Book Industry*.

The *TRENDS* Advisory Group first determined that we needed new methodology to fulfill the mandate of BISG by providing clear, consistent and comprehensive descriptions of the book market.

More specifically, a method was needed to gather and analyze statistically valid data for the full range of publishers, including data on sales in nontraditional channels, sales of digitized book products and other topics not contemplated when *TRENDS* got its start.

Dominique Raccach, a *TRENDS* Advisory Group member as well as BISG Co-Chair, offered a methodology for consideration. Drawing on her extensive background in statistics as well as on her years of experience in the book business, she recommended that we sample along a curve that objectively represents the entire publishing universe to get valid and reliable figures. R.R. Bowker generously supplied data for the curve she had in mind, one based on counts of titles in print.

Having settled on a practicable methodology, the *TRENDS* Advisory Group then developed an RFP, targeted research companies, reviewed proposals from several firms and drew up an agenda for final discussions with one.

We expect that working with this research firm and using the new, transparent methodology will allow BISG to produce and distribute statistically valid, reliable and comprehensive figures on book sales that are available nowhere else.

Over time, data collected with the new methodology will measure growth or decline of book sales in the entire industry, major publishing sectors, sub-sectors by size, new and older formats and new and older sales channels.

## Publishers/Independent Wholesalers Interest Group

*Chair: Phil Madans, Hachette Book Group USA*

At the beginning of 2008, with all major independent wholesalers agreeing to accept all products marked with EAN codes, the official work of the EAN Transition Task Force was declared completed. In March of 2008, the Task Force itself transitioned into the Publishers/Independent Wholesalers Interest Group (PIWIG), chaired by Phil Madans of Hachette Book Group USA.

One of the benefits of the EAN Task Force was the dialogue established among wholesalers, publishers and other interested parties. The exchange of information proved invaluable, not only in dealing with the transition from UPC-12 to EAN-13, but also in connection with the larger issues facing all of retail commerce, including the use of electronic data transmission and the importance of timely, accurate communications among trading partners.

The mission of this new group is to work together on the issues and opportunities facing publishers and wholesalers alike. Among topics for review are the growing interest in the Global Data Synchronization Network and the ongoing work on related metadata and transactional standards.

At the inaugural meeting in April, the Publishers/Independent Wholesalers Interest Group decided that the first order of business would be focusing on the terminology used across different supply chains, with the long-term goal of establishing a glossary of terms to enable better communications among partners.

The Chair, Phil Madans, has also become involved in the GS1 GDSN working group preparing a business case for extending GDSN metadata for the book industry and will involve PIWIG and BISAC groups in this process. PIWIG will allow publishers, independent wholesalers and any other interested parties to work more closely together on this initiative.

## Research Committee

*Chair: Kelly Gallagher, R.R. Bowker*

As in previous years, the Research Committee provided support and guidance to the BISG office in its management of *Book Industry TRENDS 2008*, and prepared for the 2009 edition by participating in discussions within the *TRENDS Advisory Group*, a Research Subcommittee led by Judith Appelbaum.

The Committee also considered a proposal to begin a project that would quantify and analyze book buying and reading habits of Spanish language readers in the United States. The Research Committee de-

terminated that the project would require partnership with an organization that has deep understanding of the Spanish-language market, but did not rule out the possibility of working on the project.

Finally, the Committee monitored the preparation and release of *Environmental Trends and Climate Impacts: Findings from the U.S. Book Industry*, which was published in March 2008.

## BISAC COMMITTEE REPORTS

BISAC (Book Industry Standards and Communications) continued to work on important industry-wide standards through its various Committees. This past year, Wendell Lotz of Ingram Book Group served as BISAC Chair.

### Identification Committee

*Chair: Laura Dawson, LJNDawson.com*

A meeting at BookExpo America in 2007 regarding “digital bloat”—the number of identifiers needed for digital versions of each product—spurred the creation of a working paper on digital identifiers. Co-sponsored by BISG and BIC, Michael Holdsworth began to work on the document, *The Identification of Digital Book Content*, in the fall of 2007, and it was published in January 2008.

In May 2008, the Identification Committee held a meeting in New York City on identifying and trading digital content that was attended by more than thirty industry representatives. Attendees focused on the following concerns:

- The numerous ISBNs for a single work that result from using the ISBN to identify each individual electronic format
- Database clutter
- Retailer and reseller assignment of ISBNs for individual electronic formats
- Business needs for separately-identified electronic formats and the definition of “tradeable” assets

The Committee determined that a series of use cases and best practices should be developed for the identification of digital content, and plans to explore this during the remainder of 2008.

## Machine Readable Coding Committee

*Chair: Tom Clarkson, Cumberland Systems Review Group (CSRG)*

Over the past several years, the Machine Readable Coding (MRC) Committee focused on preparing for the 13-digit ISBN. This work came to fruition as the transition from the 10-digit ISBN progressed smoothly.

After being on hiatus for much of the year, the Committee met in late 2007 to discuss additional guidance for displaying the ISBN and human-readable price on Cover 4. The documentation was subsequently incorporated into the “Bar Coding Guidelines” on the BISG website.

For the remainder of the year, the Chair assisted in other Committee initiatives, such as the launch of the Product Label Certification Program and the upcoming revision of the DEIG “Guidelines for Shipping Container Labeling.”

## Metadata Committee

*Chair: Richard Stark, Barnes & Noble*

The primary focus of the Metadata Committee in fiscal year 2008 was the continued development of Product Metadata Best Practices. In addition, the Committee provided input to the continuing development of ONIX for Books 3.0. The Committee also assisted in the implementation of the BISG Product Data Certification Program (PDCP). The rest of the Committee’s efforts over the past year have focused on addressing ad hoc product data standards questions within the industry. Each of these topics is covered in greater detail below.

### **Product Metadata Best Practices for Data Recipients**

The Committee spent much of the fiscal year developing “Product Metadata Best Practices for Data Recipients.” Over the course of several months of negotiation and revision the Committee developed a final draft of the best practices. This document was completed in June and it is currently awaiting approval by the BISG membership and Board of Directors.

### **ONIX**

The Committee provided input into ongoing development of ONIX for Books 3.0 throughout the year. The release of ONIX for Books 3.0 will not occur before late 2008, but the Committee’s ongoing work on ONIX will be reflected in this upcoming release. The Committee’s input was reflected in ONIX for Books Code Lists Issue 8, which was published in April 2008.

### **Product Data Certification Program (PDCP)**

The Committee’s work on PDCP in fiscal year 2008 consisted of consulting with the PDCP panel and BISG staff on questions that arose as PDCP was implemented.

### **Other Activities**

Over the course of the year, the Committee addressed various product data standards questions as they arose, clarifying the definition, policy and style guidelines for various data points. The Committee also consulted with staff from BookNet Canada and EDItEUR on the development of data standards to support information on the paper content of books.

### **Committee Membership**

The Chair of the Committee would like to express his appreciation to everyone who participated in its activities over the past year.

## **Publisher/Manufacturer Committee**

*Co-Chairs: Diane Degener, R.R. Donnelley; Brian Sharlach, McGraw-Hill*

The Publisher/Manufacturer Committee works jointly with the XBITS Working Group of papiNet to develop and promote electronic transaction standards for book publishers and manufacturers. The Committee works closely with the BISG Manufacturer's Executive Interest Group (MEIG) and will be collaborating with the ASN Subcommittee to determine the best format and process for each of the transaction standards.

The transaction standards are designed to facilitate bi-directional electronic data exchanges between publishers, printers, paper mills and component vendors. The group has developed a set of fifteen transactions based on XML standards and is now focused on implementations, documentation and marketing. Several major publishers and printers, as well as smaller suppliers, have implemented or are now actively working to implement these transactions. The transaction standards are revised by the Committee, as necessary during implementations, so they can manage all common business processes.

The Committee welcomes all BISG publisher and manufacturer members and will assist member companies in implementing the transactions. It will also coordinate with other BISG Committees working on electronic standards to be sure all industry transactions are compatible across the supply chain.

## **Subject Codes Committee**

*Chair: Connie Harbison, Baker & Taylor*

The Subject Codes Committee had another productive year in pursuit of its mission to develop and maintain the BISAC Subject Codes list and the accompanying Merchandising and Regional Themes lists. Eleven meetings were held with a steady attendance of eleven to fourteen individuals representing major publishers, wholesalers and other data aggregators, and retailers. The *BISAC Subject Codes 2007 Edition* was completed in October 2007, with substantial revisions to the Bibles section, Comics and Graphic Novels section and the Technology section.

The Committee plans to release a draft of the 2008 edition of the Subject Codes this fall. Thus far, the 2008 edition contains significant changes in one section and minor additions and literal changes in at least twenty others.

The Committee spent most of its meeting time discussing revisions to the Computer section. In October 2007, Allen Noren of O'Reilly Media, Inc., volunteered the assistance of representatives from O'Reilly to help update this section. Mike Hendrickson, also of O'Reilly Media, Inc., presented a taxonomy he developed for his company to the Committee, and the Committee used it in working to meet the needs of the publishers in the ever-changing field of computers and computing. Mr. Hendrickson participated in a number of meetings, and his expertise in the field was greatly appreciated.

Also discussed were changes to the Juvenile Fiction and Juvenile Nonfiction sections to accommodate the needs of the Christian publishing market segment and to continue the alignment of the BISAC subjects with the Christian Product Category subjects. The Committee had the opportunity to discuss this proposal at only one meeting and no final decision could be reached at that time. Unless an agreement can be reached in the next few meetings, these changes will likely be postponed until the 2009 edition.

In upcoming meetings, before the close of the 2008 edition, the Committee will be meeting with representatives from the art publishers D.A.P. and Prestel Publishing to discuss changes to the Architecture section, Art section and Photography section. These changes were first discussed at a meeting held in July 2008 by a larger group of art publishers.

No updates were made to Version 2.0 of the Merchandising Themes this fiscal year. There were a few additions to the Regional Themes based on a request from BookNet Canada. A new version of the Regional Themes will be released in conjunction with the *BISAC Subject Codes 2008 Edition*.

## Supply Chain EDI Committee

*Chair: Doug Minett, The Bookshelf*

At a meeting held June 18th and attended by forty-six industry representatives from retail, publishing, wholesale and third-party system vendors, a plan was approved to move forward with a review of core supply chain business processes, X12 version 4010 specification clarifications and development of industry best practices for EDI implementation. The following processes and X12 documents are scheduled for review:

- Purchase Order (850)
- Purchase Order Acknowledgement (855)
- Advanced Ship Notice (ASN) (856)
- Invoice (810)

### **Supply Chain Certification**

When the business and technical review is complete, the details of a certification program will be developed for these documents. Receiving special attention will be a review of issues pertaining to print-on-demand (POD), including conditional terms of trade regarding returns, and the review and certification focus on version 4010 along with the inclusion of version 5030 documentation.

### **Schedule for Fall 2008**

A preliminary schedule of SCEDI activities for the fall includes a review of Purchase Order and Purchase Order Acknowledgement (September), ASN and Invoice review (October) and, in November, a look at the progress being made on best practices documentation and the certification program.

## APPENDICES

### Appendix 1: BISG Board of Directors as of June 30, 2008

#### Officers

Co-Chairs:

**Dominique Raccah**

Publisher and CEO, Sourcebooks, Inc.

**Andrew Weber**

Senior Vice President, Operations and Technology, Random House, Inc.

Vice-Chair:

**Kelley Maier**

Senior Vice President, Product Management and Marketing, Ingram Book Group

Secretary:

**Deborah E. Wiley**

Senior Vice President, John Wiley & Sons, Inc.

Treasurer:

**David Walker**

Industry Consultant, American Booksellers Association

#### Other Executive Committee Members

**Judith Appelbaum**

Managing Director, Sensible Solutions, Inc.

**Sally Dedecker**

President, Sally Dedecker Enterprises

**Joseph Gonnella**

Vice President, Inventory Management and Vendor Relations, Barnes & Noble

**Jean Srnez**

Senior Vice President of Merchandising, Baker & Taylor, Inc.

## Other Directors

**Gary Aiello**

Chief Operating Officer, R.R. Bowker

**Craig Bauer**

Vice President of Supply Chain, Houghton Mifflin Company

**Charles Benante**

Vice President, Multisourcing, Pearson Technology

**Gary W. Brusseau**

Senior Vice President of Sales, Quebecor Books

**Anne Lloyd Davies**

Chief Information Officer, Simon & Schuster

**Peter Givler**

Executive Director, Association of American University Presses

**Ted Hill**

President, THA Consulting

**Tina Jordan**

Vice President, Association of American Publishers

**Mark Kuyper**

President & CEO, Evangelical Christian Publishers Association

**Frank Lawton**

Vice President of Quality and Resource Utilization, McGraw-Hill Education

**James Lichtenberg**

President, LIGHTSPEED, LLC

**George Lossius**

Group Chief Executive Officer, Publishing Technology, Inc.

**Allen Noren**

Director of Online Marketing, O'Reilly Media, Inc.

**Jonathan Nowell**

President, Nielsen Book

**Susan Harwood**

Senior Vice President, Merchandise Operations & Supply Chain, Borders Group, Inc.

**Rick Schwartz**

Chief Information Officer, HarperCollins Publishers

**Michael Tamblyn**

President and CEO, BookNet Canada

**Tom Turvey**

Director, Google Book Search Partnerships, Google

**Ronald Weir**

Senior Vice President, Book Sales, R.R. Donnelley

## Appendix 2: BISG and BISAC Committees Active as of June 30, 2008

### BISG Committees

**Digital Standards Committee**

Chair: Leslie Hulse, HarperCollins Publishers  
digitalstandards\_chair@bisg.org

**Distribution Executives Interest Group**

Chair: Craig Bauer, Houghton Mifflin  
Company  
deig\_chair@bisg.org

**Manufacturing Executives Interest Group**

Chair: Ira Carrel, Barnes & Noble  
meig\_chair@bisg.org

**Publishers Independent Wholesalers Interest Group**

Chair: Phil Madans, Hachette Book Group  
USA  
taskforce\_chair@bisg.org

**Publications Committee**

Chair: Judith Appelbaum, Sensible Solutions  
publications\_chair@bisg.org

**Research Committee**

Chair: Kelly Gallagher, R.R. Bowker  
research\_chair@bisg.org

### BISAC Committees

**Identification Committee**

Chair: Laura Dawson, LJDawson.com  
bisac\_identification@bisg.org

**Machine Readable Coding Committee**

Chair: Tom Clarkson, Cumberland Systems  
Review Group (CSRG)  
bisac\_mrc@bisg.org

**Metadata Committee**

Chair: Richard Stark, Barnes & Noble  
bisac\_metadata@bisg.org

**Publisher/Manufacturer Committee**

Co-Chairs: Diane Degener, R.R. Donnelley;  
Brian Sharlach, McGraw-Hill  
bisac\_pubman@bisg.org

**Subject Codes Committee**

Chair: Connie Harbison, Baker & Taylor, Inc.  
bisac\_subjectcodes@bisg.org

**Supply Chain EDI Committee**

Chair: Doug Minett, The Bookshelf  
bisac\_scedi@bisg.org

## Appendix 3: Sponsors of BISG Work in 2007-2008

BISG gratefully acknowledges the support of the following companies and organizations, which contributed to specific publications, programs and events in 2007–2008.

AAUP	Friend, <i>Environmental Trends and Climate Impacts</i>
Borders Group	Supporter, <i>Environmental Trends and Climate Impacts</i>
Cascades Fine Papers Group	Friend, <i>Environmental Trends and Climate Impacts</i> Refreshments, Publishing Business Conference and Expo
Deloitte Consulting LLC	Co-sponsor, Making Information Pay 2008
Domtar	Refreshments, Publishing Business Conference and Expo
Glatfelter	Refreshments, Publishing Business Conference and Expo
Hachette Book Group USA	Champion, <i>Environmental Trends and Climate Impacts</i>
HarperCollins Publishers	Supporter, <i>Environmental Trends and Climate Impacts</i>
Ingram Book Group	Champion, <i>Environmental Trends and Climate Impacts</i>
International Business Systems	Sponsor, BISG Annual Meeting 2007
John Wiley & Sons, Inc.	Materials sponsor, Making Information Pay 2008
Lightning Source	Champion, <i>Environmental Trends and Climate Impacts</i>
Malloy, Inc.	Friend, <i>Environmental Trends and Climate Impacts</i>
Maple-Vail Book Manufacturing Group	Friend, <i>Environmental Trends and Climate Impacts</i>
Microsoft Live Book Search	Refreshment sponsor, Making Information Pay 2008
Nielsen BookData	Co-sponsor, <i>The Identification of Digital Book Content</i>
Nielsen BookScan	Refreshment sponsor, Making Information Pay 2008
Pinnacle Press	Refreshments, Publishing Business Conference and Expo
Publishing Technology	Co-sponsor, Making Information Pay 2008
Random House, Inc.	Champion, <i>Environmental Trends and Climate Impacts</i>
R.R. Bowker	Co-sponsor, <i>The Identification of Digital Book Content</i>
Smerillo Associates	Contributor, <i>Environmental Trends and Climate Impacts</i>
Thomson-Shore, Inc.	Contributor, <i>Environmental Trends and Climate Impacts</i>

## Appendix 4: Professional Advisors to BISG

### Legal Counsel

Michael Bamberger  
Sonnenschein Nath & Rosenthal, LLP  
1221 Avenue of the Americas  
New York, NY 10020-1089

### Auditors

McGladrey & Pullen, LLP  
750 3rd Avenue, 9th Floor  
New York, NY 10017